HRMS End User Training

HRMS Benefits Training Guide

State of Washington

Ground Rules

- Let’s work together to make class enjoyable and keep on schedule:
  - Turn cell phones and pagers to vibrate or off
  - Participate to the fullest of your ability
  - Respect break start and end times
  - Share experiences and ideas
  - Ask questions
  - Maintain focus
  - Avoid side conversations
  - Do not check your e-mail or otherwise use the Web unless we are on a designated break

Introductions…

- Name
- Agency
- HRMS Role
- Goals for the class

Training Materials and Tools

The following training materials and tools are used:

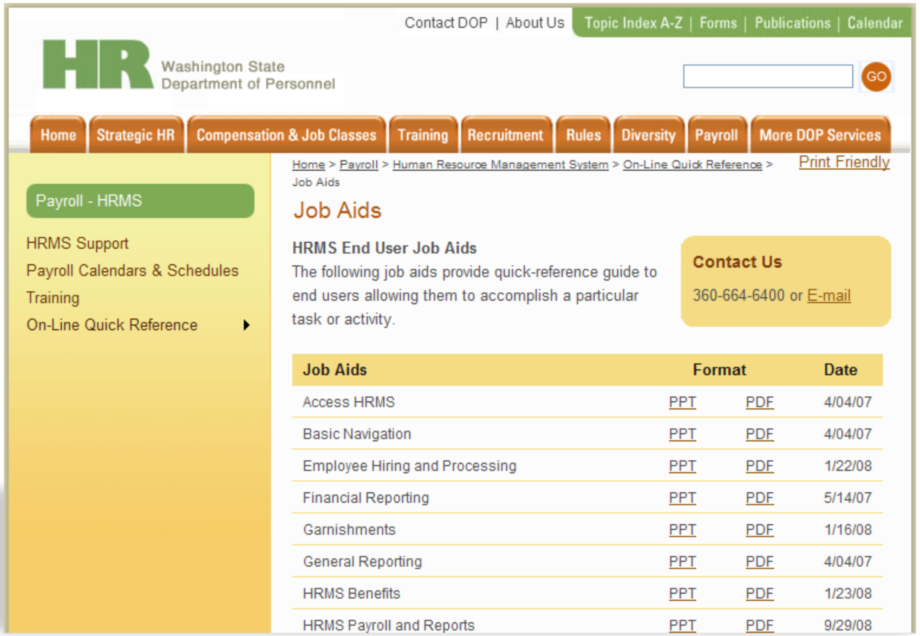
- **HRMS Training Guide**: Designed to introduce you to basic HRMS navigation terms and concepts and to provide the necessary information to complete the activities and exercises throughout the course.
- **HRMS Activity Guide:** Designed to provide you with activities and exercises that help solidify your understanding of concepts learned in the course and also provide you with an opportunity to use HRMS.

Website address:
http://www.hr.wa.gov/payroll/HRMS/OnLineQuickReference/Pages/CourseManuals.aspx

Job Aids

The following job aids are available to you and are applicable to HRMS Benefits:

- Health Care Benefits
- HRMS Benefits
  - Resources
  - Reconciliation
  - Effective Dating
- HRMS Benefits Reports
- General Reporting
- Accessing HRMS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Home > Payroll > Human Resource Management System > On-Line Quick Reference > Job Aids

Job Aids

HRMS End User Job Aids

The following job aids provide quick-reference guide to end users allowing them to accomplish a particular task or activity.

Contact Us

360-664-6400 or E-mail

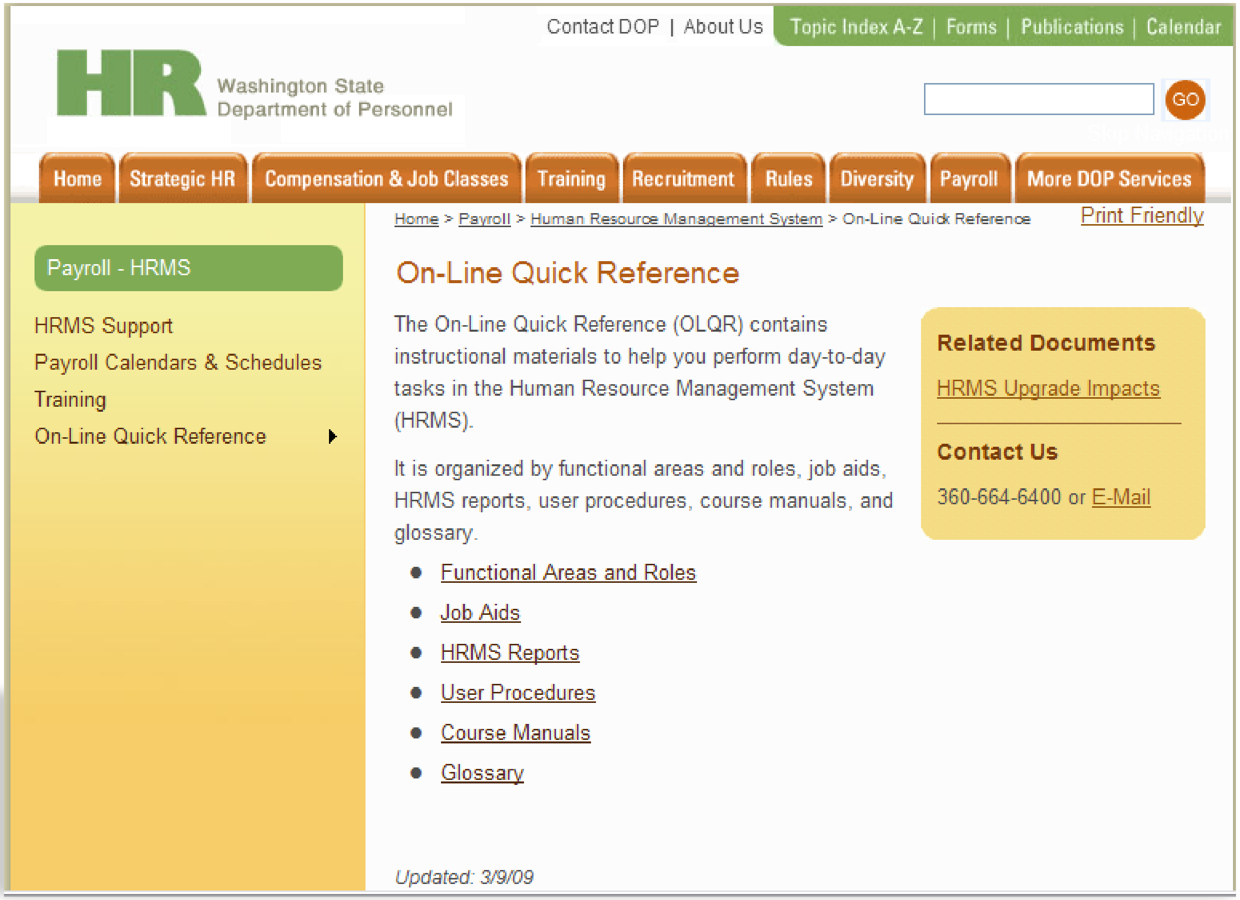
Job Aids	Format		Date
Access HRMS	PPT	PDF	4/04/07
Basic Navigation	PPT	PDF	4/04/07
Employee Hiring and Processing	PPT	PDF	1/22/08
Financial Reporting	PPT	PDF	5/14/07
Garnishments	PPT	PDF	1/16/08
General Reporting	PPT	PDF	4/04/07
HRMS Benefits	PPT	PDF	1/23/08
HRMS Payroll and Reports	PPT	PDF	9/29/08

website address:
http://www.hr.wa.gov/payroll/HRMS/OnLineQuickReference/Pages/JobAids

On-line Quick Reference

OLQR is an acronym for the On-line Quick Reference tool.

It contains a glossary, job aids, system and user procedures that describe how to perform HRMS tasks step-by-step.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On-Line Quick Reference

The On-Line Quick Reference (OLQR) contains instructional materials to help you perform day-to-day tasks in the Human Resource Management System (HRMS).

It is organized by functional areas and roles, job aids, HRMS reports, user procedures, course manuals, and glossary.

- Functional Areas and Roles
- Job Aids
- HRMS Reports
- User Procedures
- Course Manuals
- Glossary

Related Documents

HRMS Upgrade Impacts

Contact Us

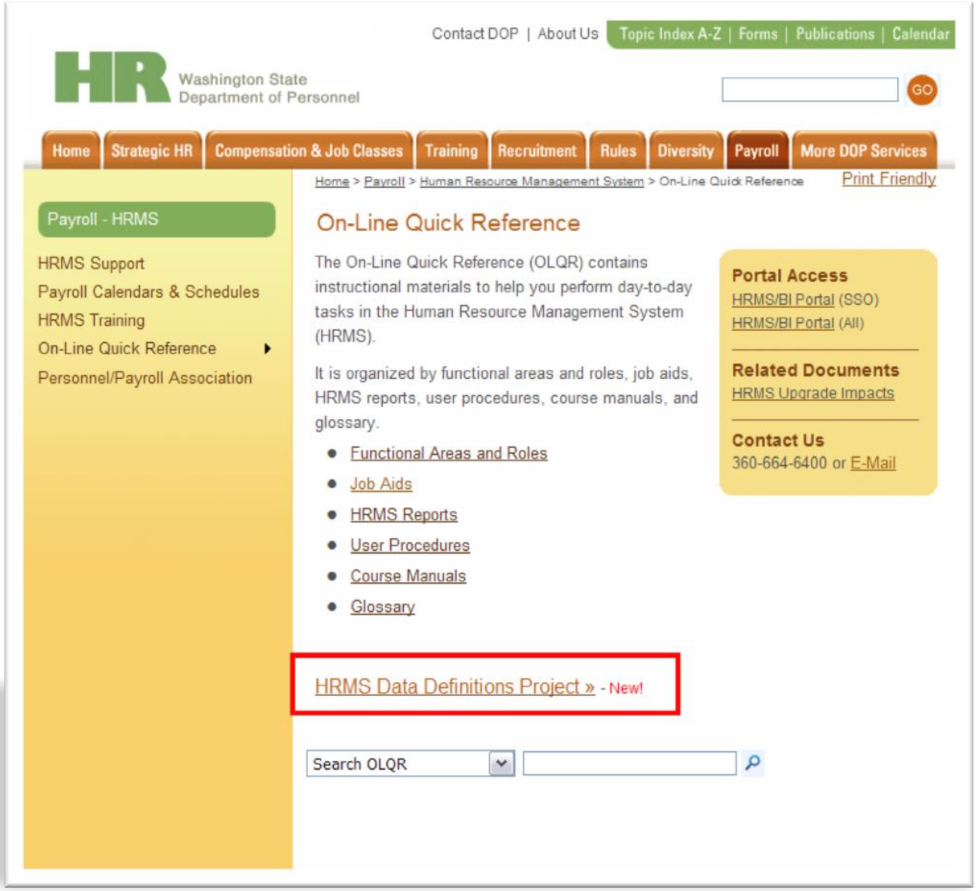
360-664-6400 or E-Mail

Updated: 3/9/09

website address: http://www.hr.wa.gov/payroll/HRMS/OnLineQuickReference

HRMS Data Definitions

HRMS Data Definitions website provides agencies with standard definitions of HRMS fields names and dropdown list options.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On-Line Quick Reference

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It is organized by functional areas and roles, job aids, HRMS reports, user procedures, course manuals, and glossary.

- Functional Areas and Roles
- Job Aids
- HRMS Reports
- User Procedures
- Course Manuals
- Glossary

HRMS Data Definitions Project » - New!

Portal Access
HRMS/BI Portal (SSO)
HRMS/BI Portal (All)

Related Documents
HRMS Upgrade Impacts

Contact Us
360-664-6400 or E-Mail

website address:
http://www.hr.wa.gov/payroll/HRMS/OnLineQuickReference/Pages/HRMSDataDefinitions.aspx

HR WSD Personnel

Course Objectives

Upon completion of this course, you will be able to:

- Understand the key components and terms of HRMS Benefits
- Subscribe and maintain Health Care Benefits
- Manage Retirement Plans
- Understand Optional Benefit Plans
- Identify key reports

HRMS Benefits Overview

HRMS Benefits Overview

Upon completion of this section, you will be able to:

- Explain the Benefits components
- Review the overall business process flow
- Define Benefits and Payroll Master Data roles
- Identify other modules and how they share information between the Benefits components

Health Care Benefits Overview

- Agencies continue to use PAY1 insurance screens to enter medical and dental insurance information (A.41 to A.46)
  - Subscriber information will update Tuesday through Saturday from HRMS into the A.01 screen (GAP 9)
  - Enrollment, transfers and terminations will be completed in the A.41 screen (GAP 16)

Health Care Benefits Overview – cont'd

- The only health care information entered and maintained in HRMS includes:
  - *Health Plans* (0167)
    - Qualified Domestic Partner status
    - Post-tax Deductions

Note: Even if employees have waived their medical coverage, they will have a medical plan record in HRMS. The plan will be recorded as 'Waived Medical Coverage'.

Retirement Benefits Overview

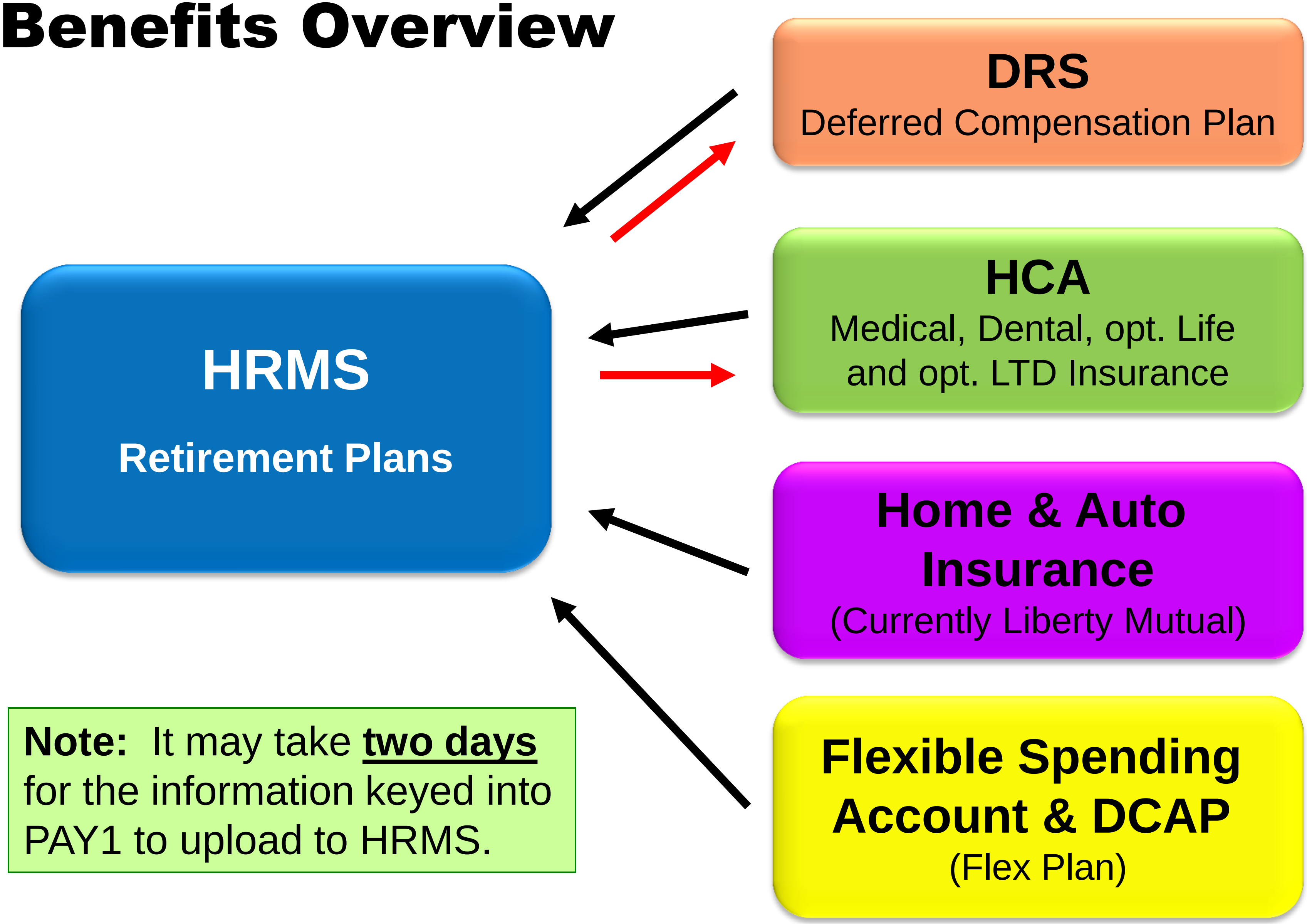
- The Retirement Enrollment process is completed in HRMS
  - Although Retirement is created and maintained in HRMS, agencies will still need to maintain DRS Web Based Employer Transmittal (WBET) system
    - General Benefits Information (0171) records the position’s retirement eligibility
  - Information is transferred to Department of Retirement Systems (GAP 46)
  - The employee’s retirement plans will be stored and maintained in Savings Plan (0169)

Optional Benefit Plans Overview

- Optional plans are maintained in HRMS or through the GAP interfaces
  - Deferred Compensation
    - Stored in *Savings Plan* (0169)
  - Life Insurance, Long Term Disability and Home & Auto Insurance
    - Stored in *Miscellaneous Plans* (0377)
  - Flexible Spending Account and Dependent Care Assistance Program (DCAP)
    - Stored in *Recurring Payments/Deductions* (0014)

Note: Some data stored in the above infotypes can only be viewed in HRMS.

Benefits Overview



DRS

Deferred Compensation Plan

HCA

Medical, Dental, opt. Life and opt. LTD Insurance

HRMS

Retirement Plans

Home & Auto Insurance

(Currently Liberty Mutual)

Flexible Spending Account & DCAP

(Flex Plan)

Note: It may take **two days** for the information keyed into PAY1 to upload to HRMS.

Key: 🟦 System with inbound interface to HRMS.

Health Care Benefits – GAPS/Interface

- **GAP 9**
  - Outbound interface to PAY1
    - Sent during the pre-defined interface schedule
  - Sets up a base record for new hires on the A.01
  - Updates salary and address changes after matching agency/sub agency if the home agency lock is on in PAY1
    - HCA uses permanent address
  - Does not update insurance information
  - Agencies must enter all insurance information into PAY1

Health Care Benefits – GAPS/Interface

- **GAP 16**
  - Inbound interface from PAY1
    - Sent during the pre-defined interface schedule
  - Populates insurance information (enrollments)
    - *Health Plans* (0167)
- **GAP 34**
  - Outbound interface to PAY1
    - Sent after payroll exits and has passed through financials
    - Reports deductions (DCAP and Flexible Spending Account)

Note 1: If insurance information is keyed in PAY1 before the appointment is established in HRMS, it will not update.
Note 2: Insurance effective date cannot be before hire date.

WSD Personnel

Retirement / Optional Plans – GAPS/Interfaces

- **GAP 16**
  - Inbound interface from DRS
    - Sent before Payroll Day 2
    - Deferred Compensation information only
  - Payroll deductions received from 3rd party vendors
    - Auto/home insurance, Life insurance, LTD, Deferred Compensation, Flexible Spending Account, and Dependent Care Assistance Program (DCAP)
      - *Miscellaneous Plans* (0377)
      - *Recurring Payments/Deductions* (0014)

Retirement / Optional Plans – GAPS/Interfaces

- **GAP 21**
  - Outbound to DRS
  - Sent during Payroll Day 4
  - Submits Journal Voucher information for retirement reporting, DCP, and Judges’ Retirement Account (JRA)

- **GAP 22**
  - Outbound to DRS
  - Sent during Payroll Day 4
  - This interface file sends Deferred Compensation data for processing

Retirement / Optional Plans – GAPS/Interfaces

- **GAP 46**
  - Outbound to DRS
  - Sent during Payroll Day 4
  - Represents payroll deductions for plan contributions after each payroll cycle for employee and employer
  - Submits employee demographic updates (separations, hires, transfers, address changes, etc.)
- **GAP 48**
  - Inbound from DRS
  - Sent on 1st workday of the month
  - Provides employee plan history

Benefits Master Data Maintenance Roles

- HRMS has role-based security
- System security dictates the information that you can update
- Your agency assigned your role based on what tasks you perform
- There are agency-level and centralized payroll roles

Benefits Master Data Roles

Agency Decentralized role

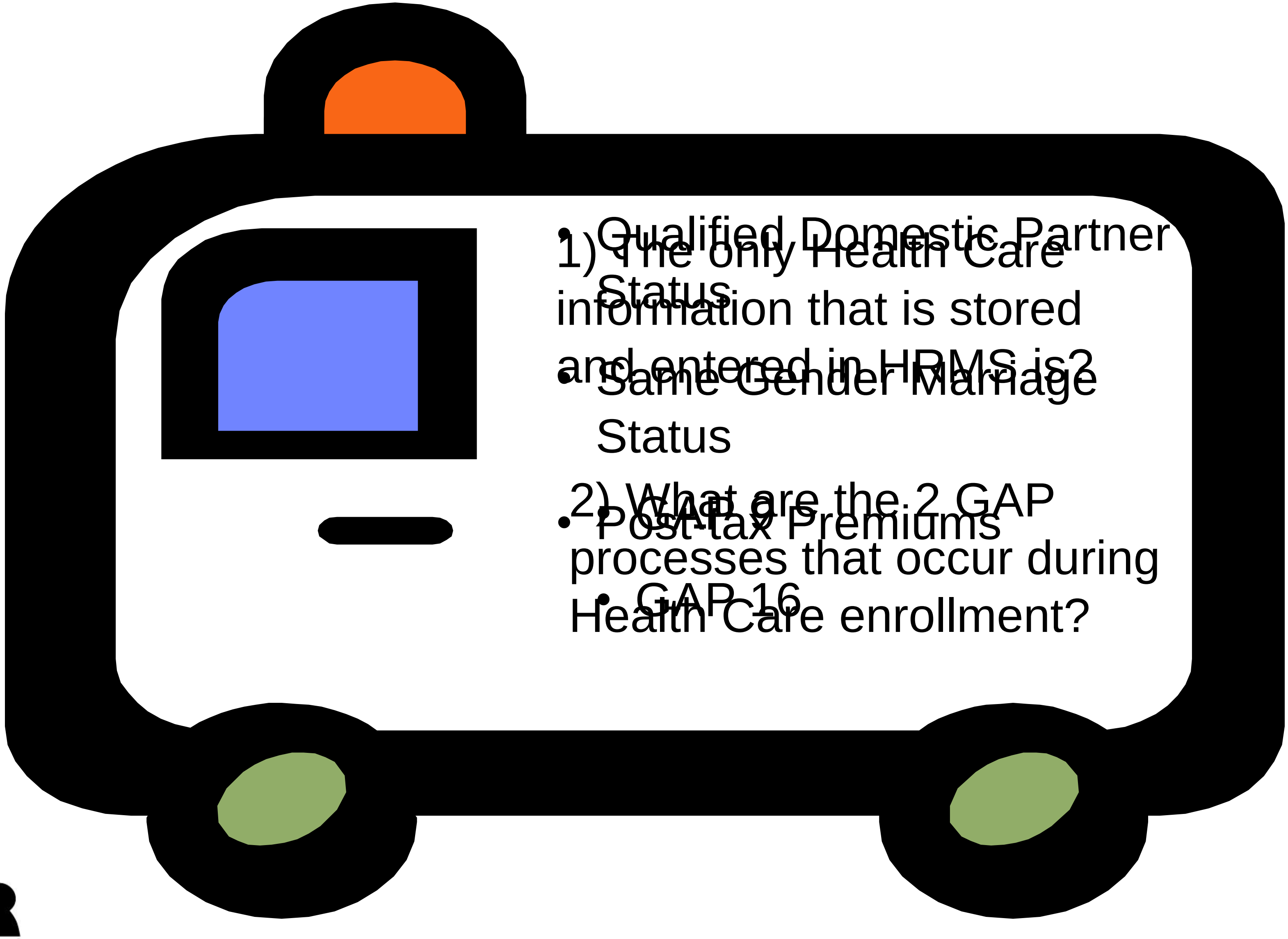
- **Benefits Processor**
  Creates and maintains benefit plan participation for their agencies eligible employees. The Benefits Processor also provides general benefits advice, guidance, and support to managers and supervisors.

  Note: This role is a subset of the Payroll Processor with more limited access and ability to update information in the system.

Centralized role

- **Benefits Configuration Analyst (DES)**
  Creates and maintains retirement plans, configures new health and insurance plans and annual rate changes.

Review Questions



1) The only Health Care information that is stored and entered in HRMS is?

- Qualified Domestic Partner Status
- Same Gender Marriage Status

2) What are the 2 GAP processes that occur during Health Care enrollment?

- Post-tax Premiums
  - GAP 9
  - GAP 16

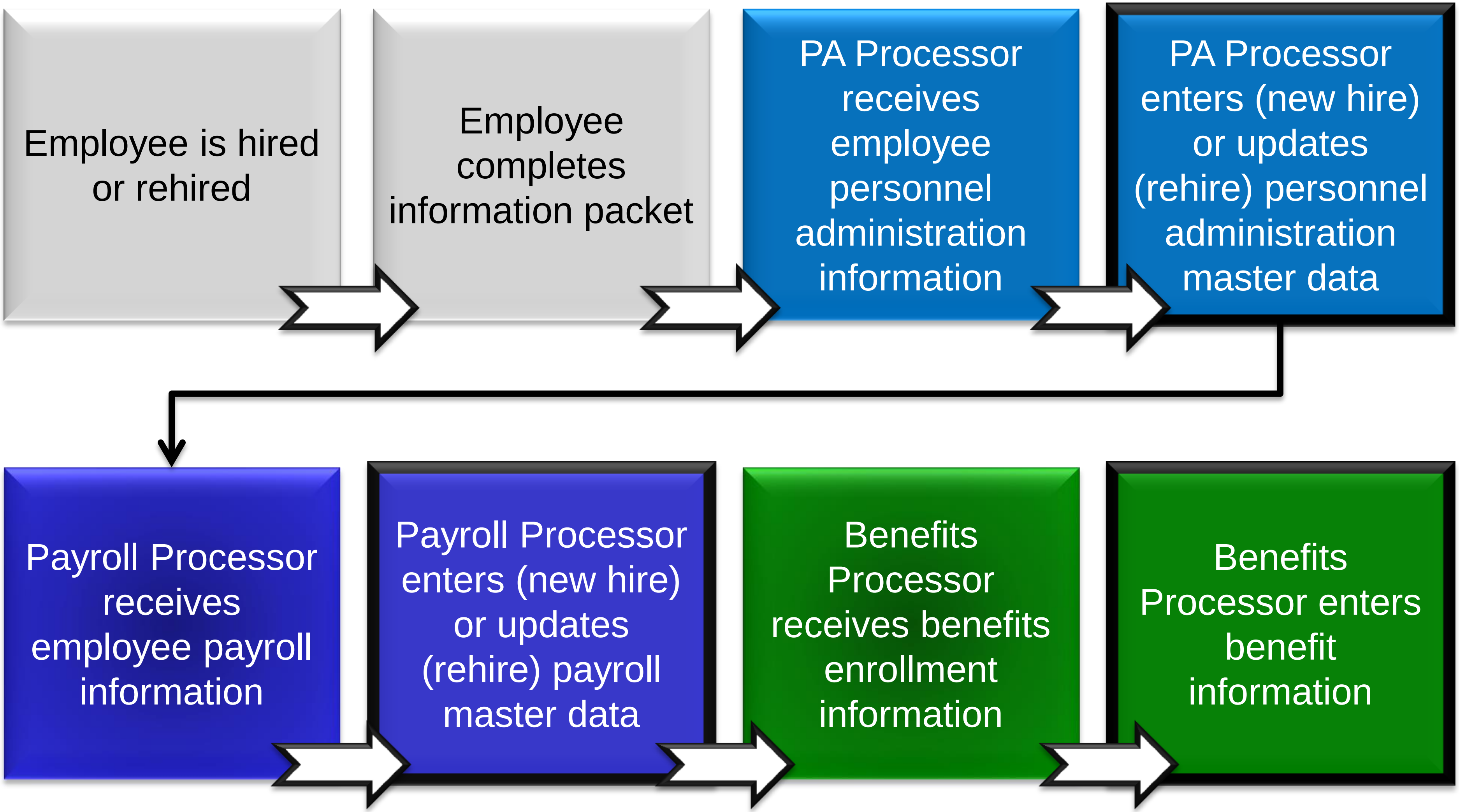
Health Care Benefits – New Hire / Rehire

Health Care - New Hire / Rehire

Upon completion of this section, you will be able to:

- Explain the overall business process
- Understand the integration between PAY1 system and HRMS
- Discuss key dates and timelines

New Hire / Rehire Process Flow



Employee is hired or rehired

Employee completes information packet

PA Processor receives employee personnel administration information

PA Processor enters (new hire) or updates (rehire) personnel administration master data

Payroll Processor receives employee payroll information

Payroll Processor enters (new hire) or updates (rehire) payroll master data

Benefits Processor receives benefits enrollment information

Benefits Processor enters benefit information

Legend: ☐ HRMS Entry 🟦 HR 🟦 Payroll 🟩 Benefits

Health Care - New Hire / Rehire Action

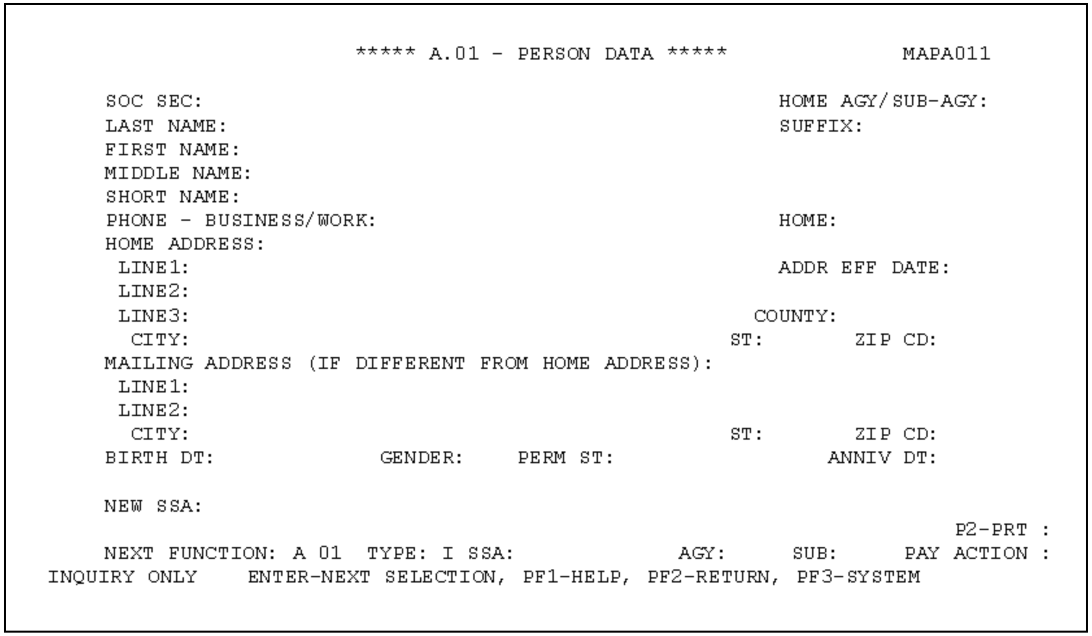
- During the New Hire and Rehire action, the Personnel Administration Processor completes the *Personal Data* (0002) and *Addresses* (0006) infotypes.
  - The interface file (GAP 9) will populate the PAY1 – A.01 screen with the following:
    - Name
    - Social Security Number
    - Permanent Address
    - Mailing Address
    - Birth date
    - Gender
    - Permanent Status
    - Salary

Health Care - New Hire / Rehire Action

- Once the interface has occurred, the enrollment process can begin. This process can take up to 2 days to complete. (This can be critical when enrolling an employee during the Payroll Processing Cycle.)
- When the employee's insurance eligibility has been established in the PAY1 system, the interface (GAP 16) will be sent to HRMS with the detailed health benefits information.
  - Be sure to verify information in both PAY1 and HRMS as these systems **must match** or an error will occur. (Health Care Authority will contact agencies regarding any errors that need to be corrected.)

Health Care Subscriber Personnel Data

- The A.01 screen must be established before the employee can be enrolled
- Agencies will continue to have update capability on the A.01 where the following information is collected:
  - SSN
  - Home Agy/Sub-Agy
  - Name
  - Permanent Address
  - Mailing Address
  - Phone
  - Birthdate



```
                        ***** A.01 - PERSON DATA *****            MAPA011

    SOC SEC:                                              HOME AGY/SUB-AGY:
    LAST NAME:                                            SUFFIX:
    FIRST NAME:
    MIDDLE NAME:
    SHORT NAME:
    PHONE - BUSINESS/WORK:                                HOME:
    HOME ADDRESS:
     LINE1:                                               ADDR EFF DATE:
     LINE2:
     LINE3:                                             COUNTY:
      CITY:                                            ST:       ZIP CD:
    MAILING ADDRESS (IF DIFFERENT FROM HOME ADDRESS):
     LINE1:
     LINE2:
      CITY:                                            ST:       ZIP CD:
    BIRTH DT:             GENDER:    PERM ST:              ANNIV DT:

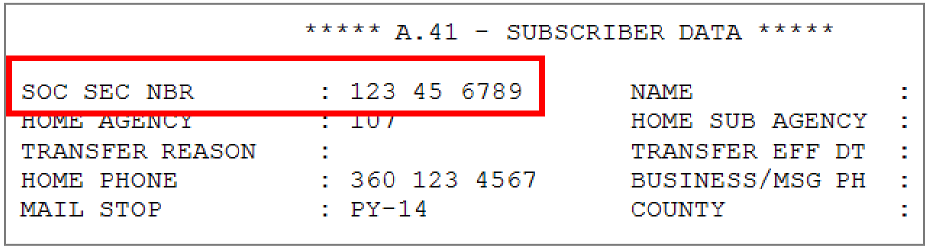
    NEW SSA:
                                                                    P2-PRT :
    NEXT FUNCTION: A 01  TYPE: I SSA:             AGY:     SUB:     PAY ACTION :
INQUIRY ONLY    ENTER-NEXT SELECTION, PF1-HELP, PF2-RETURN, PF3-SYSTEM
```

Health Care Default Process

- During the New Hire or Rehire process, employees have a 31-day choice period when selecting their medical plan.
    - At this time, agencies should **NOT** make any entries in PAY1 until the documentation from the employee has been received.
        - No contributions will be taken for the Employee or Employer share.
    - Once selected, use the date in which the employee was eligible for insurance.
        - Employees will default to the Uniform Medical Plan if no selection is made within the given time frame.

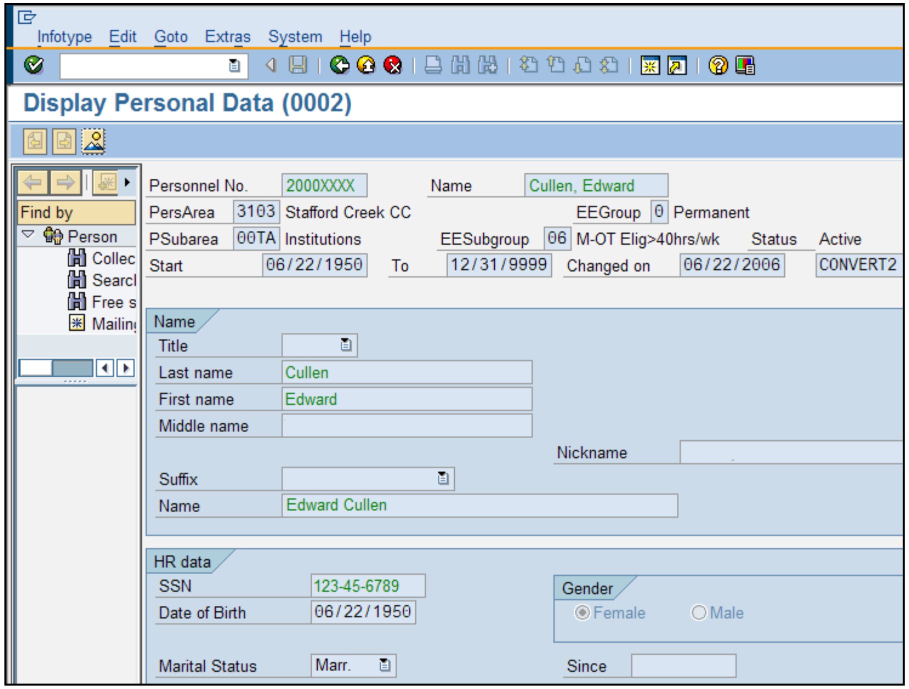
Health Care Subscriber Personnel Data

- In most cases, there will be no requirement for dual entry because of the pre-defined interface schedule between HRMS and PAY1
- Dual entry would only be required when the employee's SSN is entered incorrectly
- The SSN must be corrected in both HRMS **AND** PAY1 on the same day



```
                    ***** A.41 - SUBSCRIBER DATA *****

SOC SEC NBR        : 123 45 6789       NAME             :
HOME AGENCY        : 107               HOME SUB AGENCY  :
TRANSFER REASON    :                   TRANSFER EFF DT  :
HOME PHONE         : 360 123 4567      BUSINESS/MSG PH  :
MAIL STOP          : PY-14             COUNTY           :
```



Display Personal Data (0002)

Personnel No. 2000XXXX
Name Cullen, Edward
PersArea 3103 Stafford Creek CC
EEGroup 0 Permanent
PSubarea 00TA Institutions
EESubgroup 06 M-OT Elig>40hrs/wk
Status Active
Start 06/22/1950
To 12/31/9999
Changed on 06/22/2006 CONVERT2

Name
Title
Last name Cullen
First name Edward
Middle name
Nickname
Suffix
Name Edward Cullen

HR data
SSN 123-45-6789
Date of Birth 06/22/1950
Gender ● Female ○ Male
Marital Status Marr.
Since

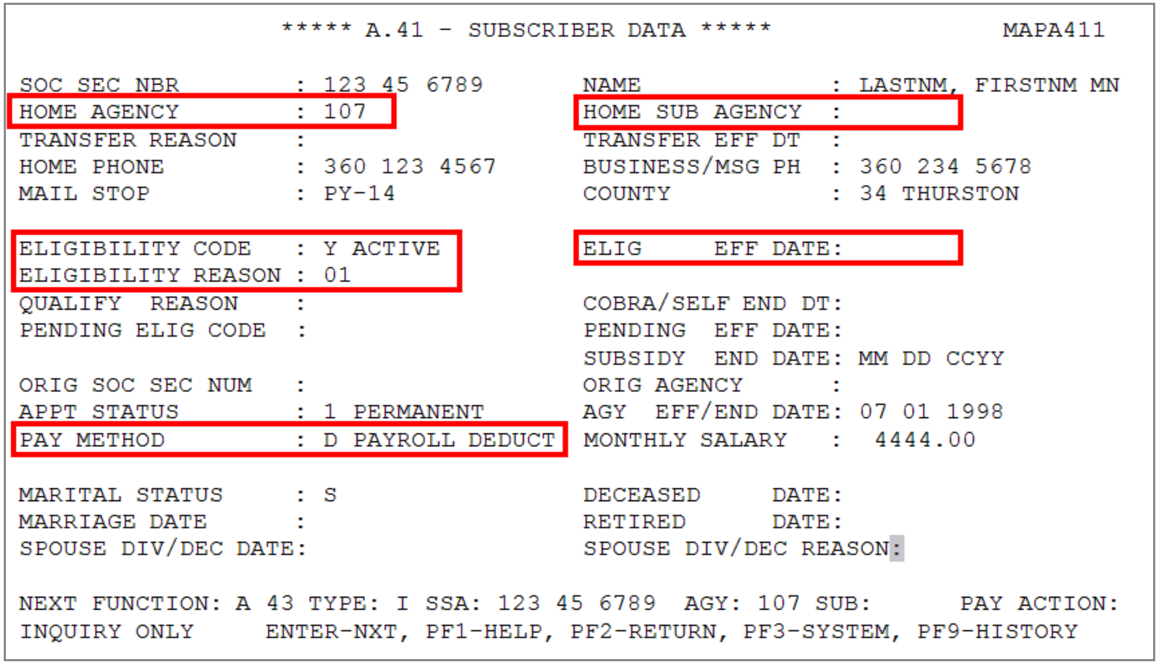
Health Care Benefits Enrollment

- An employee’s home agency will maintain the insurance screens and ensure the employer share is being paid.
- The home agency is established when the A.41 screen is completed.
- When a subscriber’s insurance eligibility is established in PAY1, an agency lock is set on that employee.
  - Only the agency with the lock will have update capability for the subscriber

Health Care Benefits Enrollment

To enroll an employee:

- Access the A.41 screen in **UPDATE** mode
- Fields to complete:
  - **HOME AGENCY**
  - **HOME SUB AGENCY**
  - **ELIG. CODE**
  - **ELIG. REASON**
  - **ELIG EFF DATE**
  - **PAY METHOD**



```
                  ***** A.41 - SUBSCRIBER DATA *****               MAPA411

SOC SEC NBR        : 123 45 6789       NAME             : LASTNM, FIRSTNM MN
HOME AGENCY        : 107               HOME SUB AGENCY  :
TRANSFER REASON    :                   TRANSFER EFF DT  :
HOME PHONE         : 360 123 4567      BUSINESS/MSG PH  : 360 234 5678
MAIL STOP          : PY-14             COUNTY           : 34 THURSTON

ELIGIBILITY CODE   : Y ACTIVE          ELIG     EFF DATE:
ELIGIBILITY REASON : 01
QUALIFY  REASON    :                   COBRA/SELF END DT:
PENDING ELIG CODE  :                   PENDING  EFF DATE:
                                       SUBSIDY  END DATE: MM DD CCYY
ORIG SOC SEC NUM   :                   ORIG AGENCY      :
APPT STATUS        : 1 PERMANENT       AGY  EFF/END DATE: 07 01 1998
PAY METHOD         : D PAYROLL DEDUCT  MONTHLY SALARY   :  4444.00

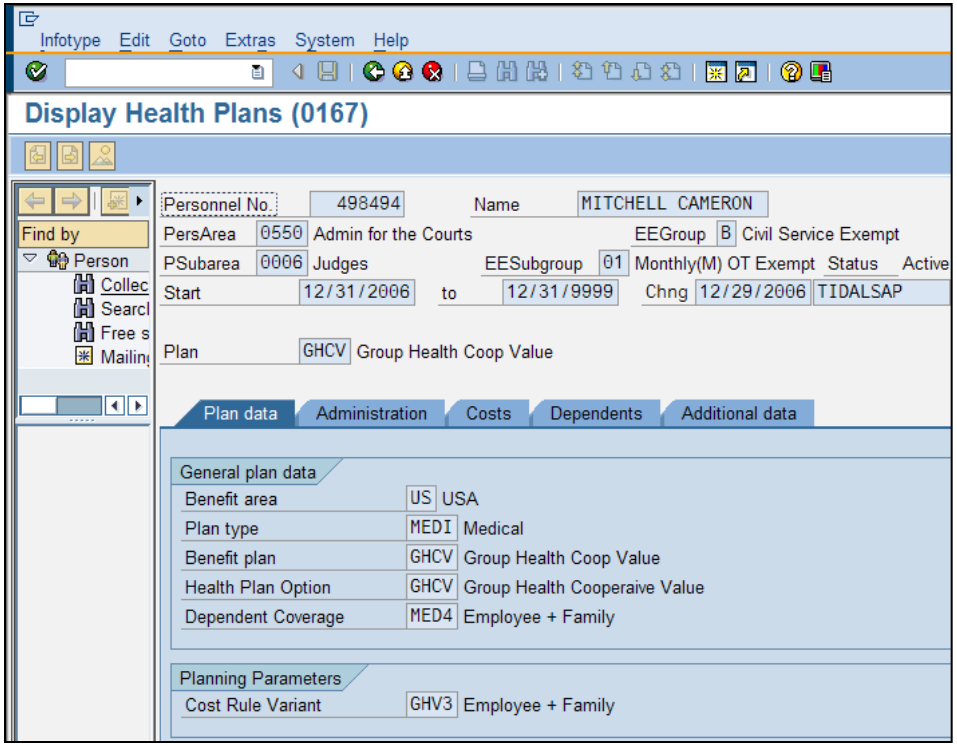
MARITAL STATUS     : S                 DECEASED     DATE:
MARRIAGE DATE      :                   RETIRED      DATE:
SPOUSE DIV/DEC DATE:                   SPOUSE DIV/DEC REASON:

NEXT FUNCTION: A 43 TYPE: I SSA: 123 45 6789  AGY: 107 SUB:      PAY ACTION:
INQUIRY ONLY     ENTER-NXT, PF1-HELP, PF2-RETURN, PF3-SYSTEM, PF9-HISTORY
```

Note: Use the TAB button to move through the different fields.

Health Care Benefits Enrollment - Interface

- When establishing insurance eligibility or making changes in the PAY1 system, the interface file (GAP 16) will be sent to HRMS.
  - The GAP 16 files will contain new enrollment, medical and dental plan changes, family composition changes, terminations and effective dates.


Infotype
Edit
Goto
Extras
System
Help
Find by
Person
Collec
Searcl
Free s
Mailin
Plan data
Administration
Costs
Dependents
Additional data

Display Health Plans (0167)

Personnel No.	498494	Name	MITCHELL CAMERON
PersArea	0550 Admin for the Courts	EEGroup	B Civil Service Exempt
PSubarea	0006 Judges	EESubgroup	01 Monthly(M) OT Exempt
Status	Active		
Start	12/31/2006	to	12/31/9999
Chng	12/29/2006 TIDALSAP		
Plan	GHCV Group Health Coop Value		

General plan data

Benefit area	US	USA
Plan type	MEDI	Medical
Benefit plan	GHCV	Group Health Coop Value
Health Plan Option	GHCV	Group Health Cooperaive Value
Dependent Coverage	MED4	Employee + Family

Planning Parameters

Cost Rule Variant	GHV3	Employee + Family

HRMS Activity

View Medical and Dental Plans

Enrollment Dates

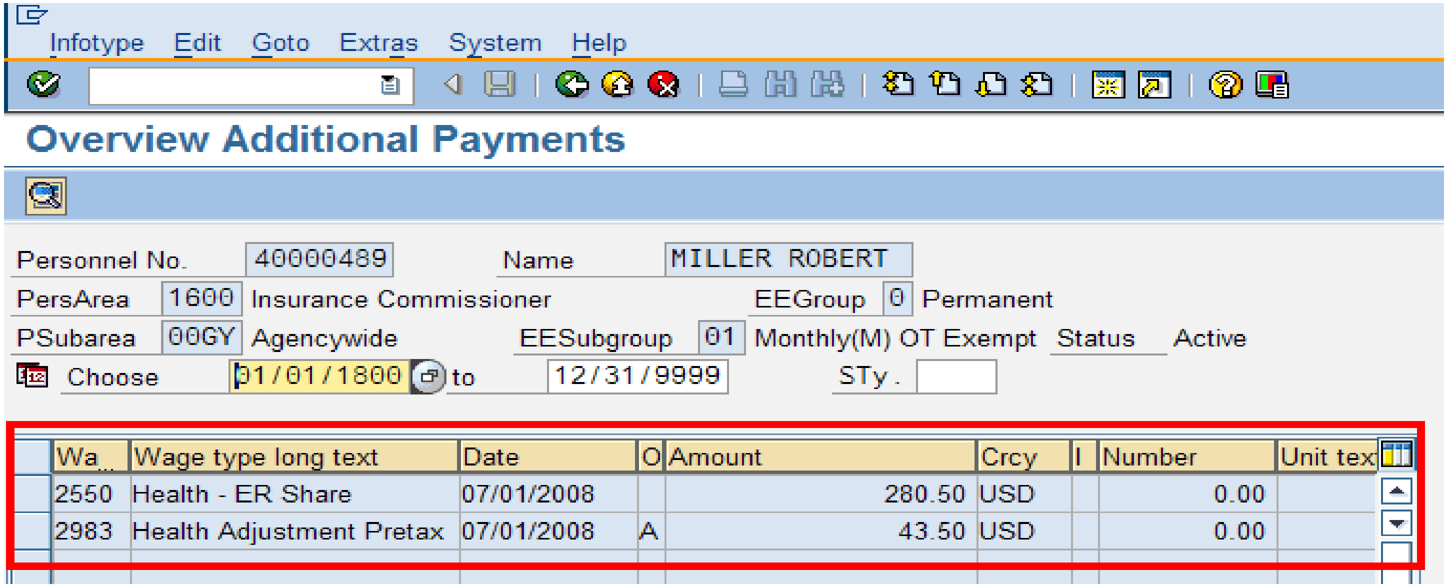
- When entering the employee's eligibility effective date on the A.41 screen in PAY1, it is important to use the same date that was used to create the New Hire or Rehire action.
  - For example: if the employee's first day is the 2nd of the month and the 2nd is the 1st working day of the month, then the 2nd should be keyed on the A.41 screen when establishing insurance.
  - Another example: if the 1st of the month falls on a Saturday and the new person starts work on Monday (3rd of the month), you will need to key the 3rd on the A.41 screen.

Note: If the new employee's start date in PAY1 is prior to the start date in HRMS the record will be rejected.

Enrollment Deductions

- When a new employee is hired on the 1st working day of the month, neither the employer nor employee deductions are taken for the 10th payroll. A one-time payment must be created on *Additional Payments* (0015) to collect the missing deductions.
  - For example – an employee was hired on May 1, 2009 and the health insurance was entered into PAY1 on May 20, 2009. The Payroll Processor would need to create a one-time payment to collect the employer and employee deduction for the 10th premium using the following wage types:
    - 2550 Health ER share
    - 2983 Health Insurance Pre-Tax or 2984 Health Insurance Post-Tax
    - 2575 Provider cost of medical and dental premiums for reporting on the W-2

Enrollment Deductions – cont’d



Overview Additional Payments

Personnel No. 40000489 Name MILLER ROBERT

PersArea 1600 Insurance Commissioner EEGroup 0 Permanent

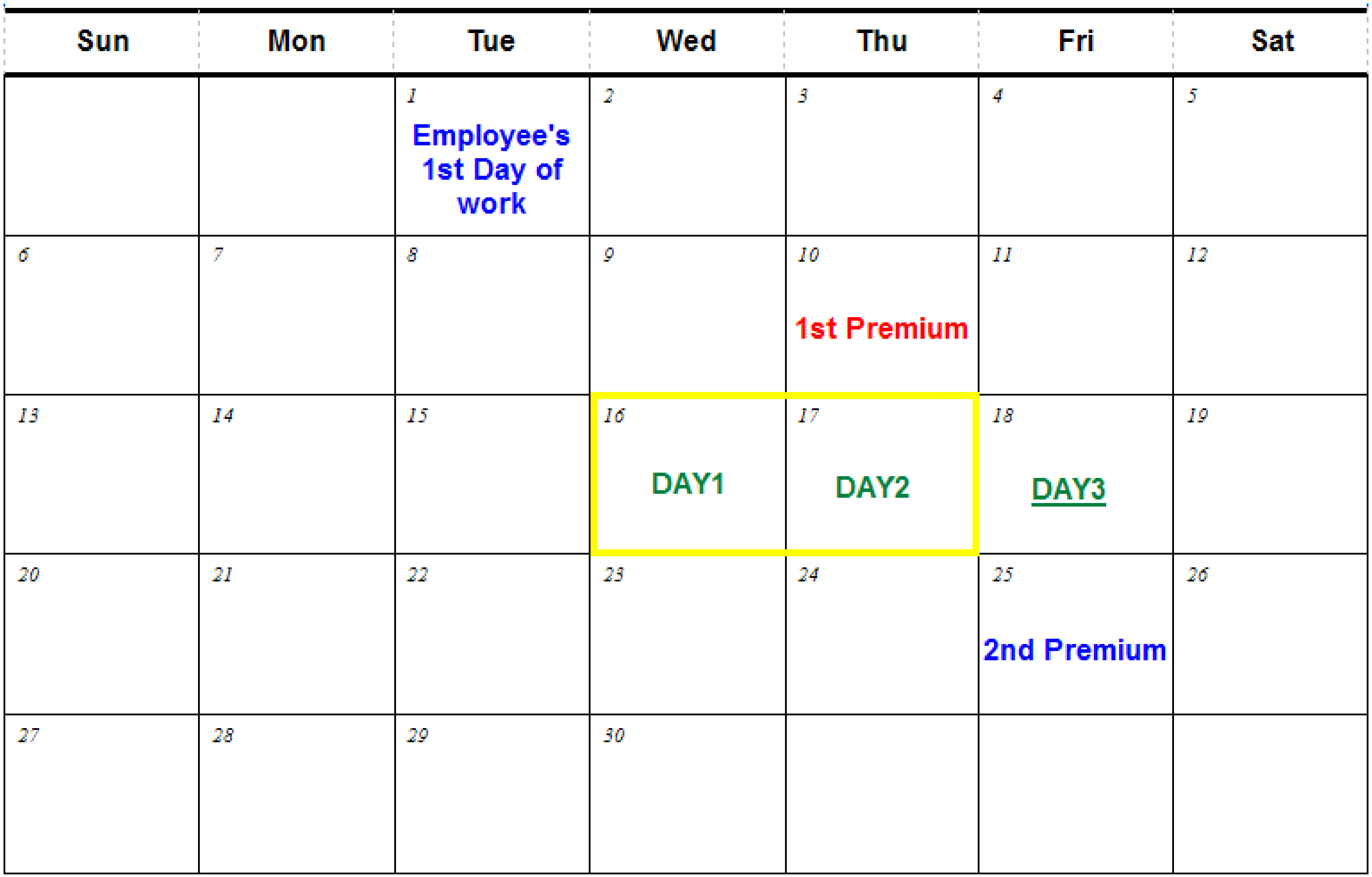
PSubarea 00GY Agencywide EESubgroup 01 Monthly(M) OT Exempt Status Active

Choose 01/01/1800 to 12/31/9999 STy.

Wa..	Wage type long text	Date	O	Amount	Crcy	I	Number	Unit tex
2550	Health - ER Share	07/01/2008		280.50	USD		0.00	
2983	Health Adjustment Pretax	07/01/2008	A	43.50	USD		0.00	

- Another example: An entry has been made to start an employee’s medical benefits who began work on the 1st and are paid for the first time on the 25th. Insurance is entered at the last minute on Day 3 of payroll processing and information is not coming through on GAP 16. A manual adjustment will need to be done for the whole month’s premium.
  - See OLQR User Procedure, [Create Pre-Pay1 Insurance Deduction]()

Enrollment Deductions – cont'd

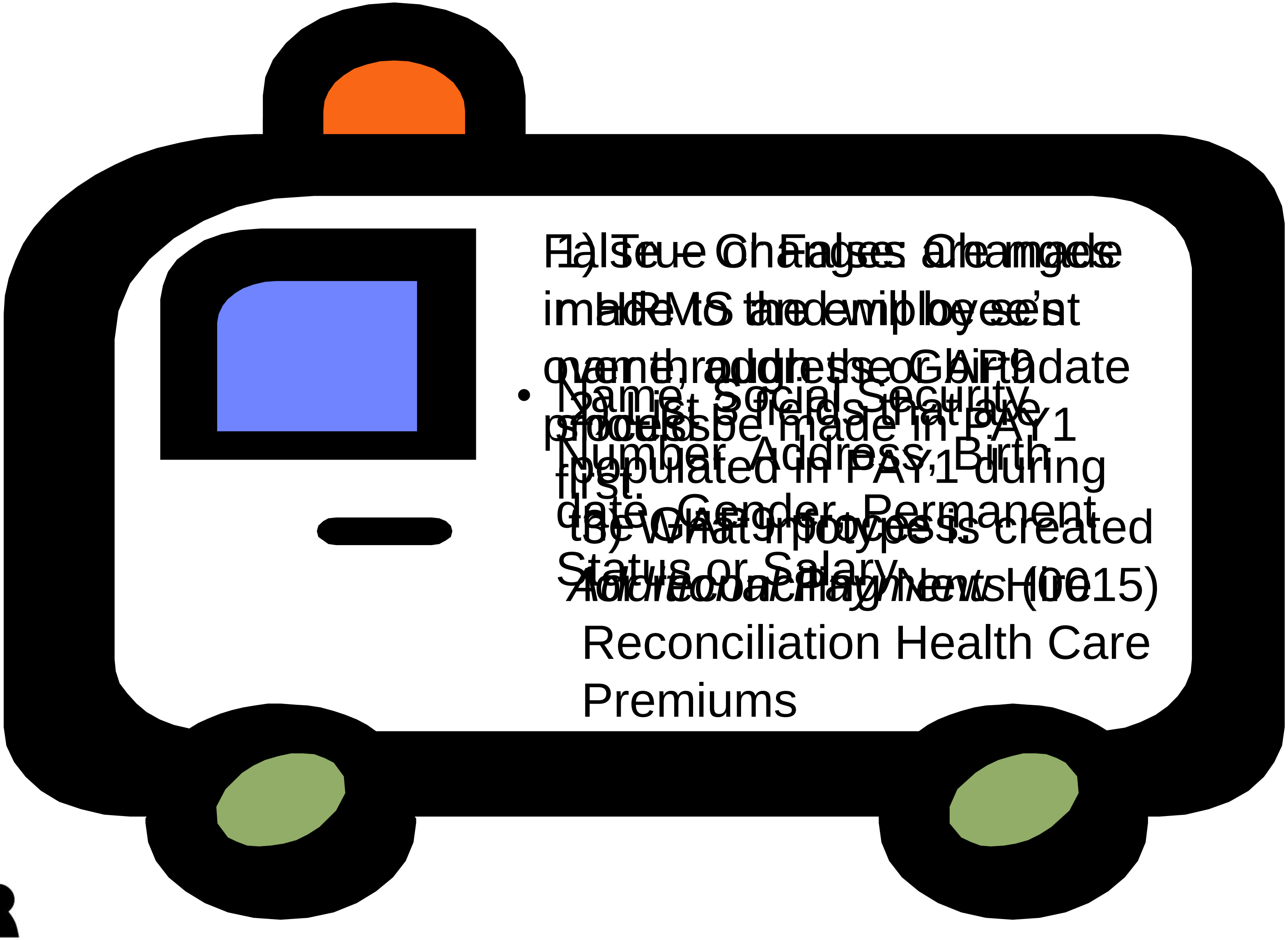


Sun	Mon	Tue	Wed	Thu	Fri	Sat
		1 Employee's 1st Day of work	2	3	4	5
6	7	8	9	10 1st Premium	11	12
13	14	15	16 DAY1	17 DAY2	18 DAY3	19
20	21	22	23	24	25 2nd Premium	26
27	28	29	30			

Health Care Benefits - Additional Information

- Even if employees have waived their medical coverage, they will have a medical plan record in HRMS. The record will be for the Waived medical plan. This is to allow the employer contributions to be collected for the employee and to allow the required dental plan enrollment.
- Use **CAUTION** when keying insurance information on Days 1, 2 or 3 of payroll processing.
  - *Health Plans* (0167) may need to be manually created for both Medical and Dental benefits.
  - The GAP 16 interface will override data created in HRMS.
  - *General Benefits Information* (0171) must be created before *Health Plans* (0167) can be created.
  - When manually keying in medical information, be sure to check the pre-tax box unless the employee wants post-tax. (GAP 16 defaults as pre-tax, but the default for manual entry is post-tax.)

Review Questions



1) True or False: Changes made to HRMS that will be sent over through the GAP9 process must be made in PAY1 first.

False – Changes are made in HRMS to the employee's name, address or birthdate

2) List 3 fields that are populated in PAY1 during the GAP9 process:

- Name, Social Security Number, Address, Birth date, Gender, Permanent Status or Salary.

3) What infotype is created for Retroactive New Hire Reconciliation Health Care Premiums

Additional Payments (0015)

HR
WSD Personnel

Health Care Benefits – Appointment Change

Health Care – Appointment Change

Upon completion of this section, you will be able to:

- Define the Appointment Change Overview
- Interpret the Business Process Flow
- Explain Data-Entry process in PAY1
- Distinguish Important Dates

Employee Appointment Changes

- The Appointment Change action is used for appointments within the agency and appointments between different agencies
  - Examples include:
    - Promotion
    - Demotion
    - Transfer
    - Reallocation

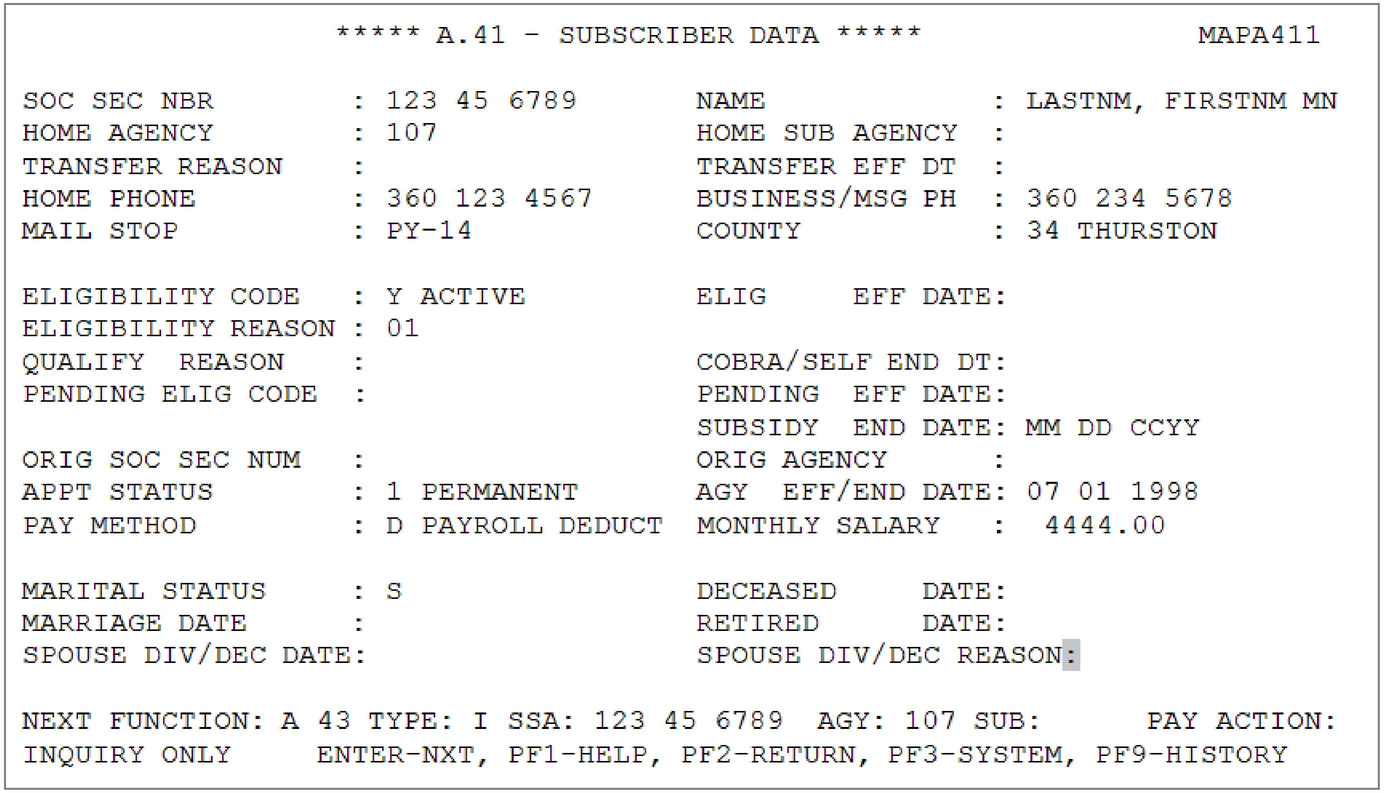
Appointment Change Overview

- During the Appointment Change action many infotypes that were created in the Hire action are reviewed and updated.
  - The employee’s information is carried over to the gaining agency without the losing agency performing a separation.
    - Leave Balances
    - Deductions
    - Benefits

- When an employee is leaving for another agency, the losing agency does not have to separate the employee in HRMS for the gaining agency to pick them up.

Health Care Benefits – Agency Transfers

- When an employee is transferred, the agency lock is released to the new agency. Action is required by the losing **and** gaining agency.
- The lock is released when the PAY1 - A.41 screen is updated by the losing agency with the transfer information.



```
                  ***** A.41 - SUBSCRIBER DATA *****                MAPA411

SOC SEC NBR        : 123 45 6789       NAME             : LASTNM, FIRSTNM MN
HOME AGENCY        : 107               HOME SUB AGENCY  :
TRANSFER REASON    :                   TRANSFER EFF DT  :
HOME PHONE         : 360 123 4567      BUSINESS/MSG PH  : 360 234 5678
MAIL STOP          : PY-14             COUNTY           : 34 THURSTON

ELIGIBILITY CODE   : Y ACTIVE          ELIG     EFF DATE:
ELIGIBILITY REASON : 01
QUALIFY  REASON    :                   COBRA/SELF END DT:
PENDING ELIG CODE  :                   PENDING  EFF DATE:
                                       SUBSIDY  END DATE: MM DD CCYY
ORIG SOC SEC NUM   :                   ORIG AGENCY      :
APPT STATUS        : 1 PERMANENT       AGY  EFF/END DATE: 07 01 1998
PAY METHOD         : D PAYROLL DEDUCT  MONTHLY SALARY   :  4444.00

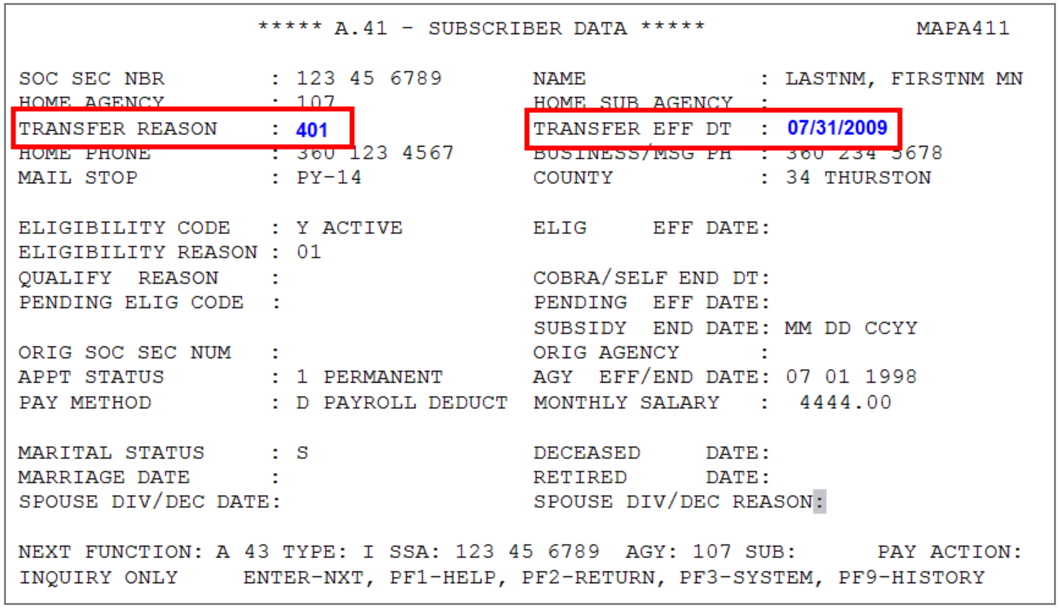
MARITAL STATUS     : S                 DECEASED     DATE:
MARRIAGE DATE      :                   RETIRED      DATE:
SPOUSE DIV/DEC DATE:                   SPOUSE DIV/DEC REASON:

NEXT FUNCTION: A 43 TYPE: I SSA: 123 45 6789  AGY: 107 SUB:      PAY ACTION:
INQUIRY ONLY     ENTER-NXT, PF1-HELP, PF2-RETURN, PF3-SYSTEM, PF9-HISTORY
```

Health Care Benefits Transfer – Losing Agency

To transfer an employee:

- Access the A.41 screen in UPDATE mode
- Fields to complete:
  - **Transfer Reason**
    - 401 (Transfer Out)
  - **Transfer Eff Date**
    - Last day of the month
- **F10** to update



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                   ***** A.41 - SUBSCRIBER DATA *****                MAPA411

SOC SEC NBR          : 123 45 6789        NAME                 : LASTNM, FIRSTNM MN
HOME AGENCY          : 107                HOME SUB AGENCY      :
TRANSFER REASON      : 401                TRANSFER EFF DT      : 07/31/2009
HOME PHONE           : 360 123 4567       BUSINESS/MSG PH      : 360 234 5678
MAIL STOP            : PY-14              COUNTY               : 34 THURSTON

ELIGIBILITY CODE     : Y ACTIVE           ELIG     EFF DATE:
ELIGIBILITY REASON : 01
QUALIFY  REASON      :                    COBRA/SELF END DT:
PENDING ELIG CODE    :                    PENDING  EFF DATE:
                                          SUBSIDY  END DATE: MM DD CCYY
ORIG SOC SEC NUM     :                    ORIG AGENCY          :
APPT STATUS          : 1 PERMANENT        AGY  EFF/END DATE: 07 01 1998
PAY METHOD           : D PAYROLL DEDUCT   MONTHLY SALARY    :   4444.00

MARITAL STATUS       : S                  DECEASED      DATE:
MARRIAGE DATE        :                    RETIRED       DATE:
SPOUSE DIV/DEC DATE:                      SPOUSE DIV/DEC REASON:

NEXT FUNCTION: A 43 TYPE: I SSA: 123 45 6789  AGY: 107 SUB:      PAY ACTION:
INQUIRY ONLY      ENTER-NXT, PF1-HELP, PF2-RETURN, PF3-SYSTEM, PF9-HISTORY
```

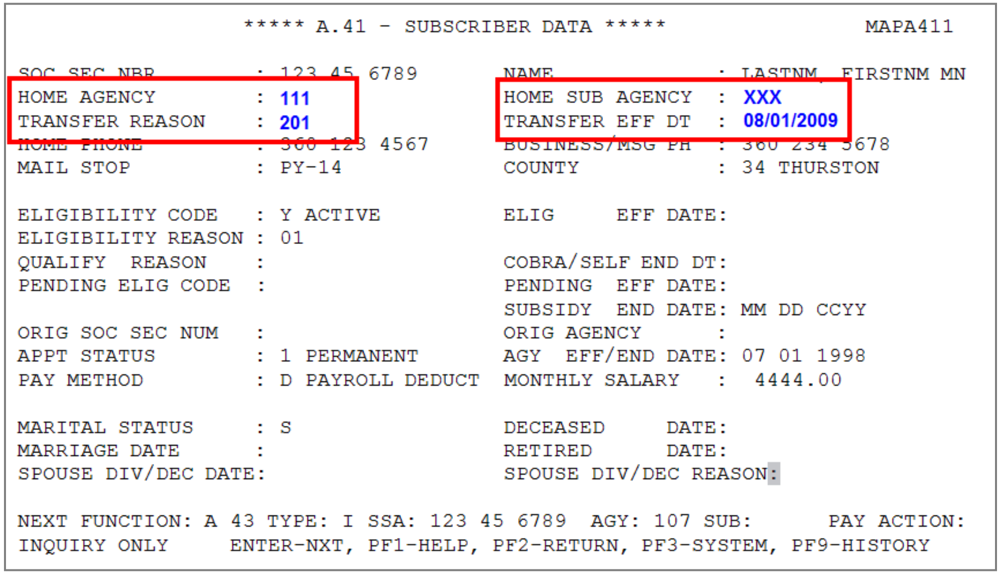
Note: Use the TAB button to move through the different fields.

WSD Personnel

Health Care Benefits Transfer – Gaining Agency

To enroll an employee:

- Access the A.41 screen in UPDATE mode
- Fields to complete:
  - **Home Agency**
  - **Home Sub Agency**
  - **Transfer Reason**
    - 201 (Transfer in)
  - **Transfer Eff Date**
    - First day of the month
- **<u>F10</u>** to Update



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                   ***** A.41 - SUBSCRIBER DATA *****                  MAPA411

SOC SEC NBR          : 123 45 6789          NAME               : LASTNM, FIRSTNM MN
HOME AGENCY          : 111                  HOME SUB AGENCY    : XXX
TRANSFER REASON      : 201                  TRANSFER EFF DT    : 08/01/2009
HOME PHONE           : 360 123 4567         BUSINESS/MSG PH    : 360 234 5678
MAIL STOP            : PY-14                COUNTY             : 34 THURSTON

ELIGIBILITY CODE     : Y ACTIVE             ELIG     EFF DATE:
ELIGIBILITY REASON   : 01
QUALIFY  REASON      :                      COBRA/SELF END DT:
PENDING ELIG CODE    :                      PENDING  EFF DATE:
                                            SUBSIDY  END DATE: MM DD CCYY
ORIG SOC SEC NUM     :                      ORIG AGENCY       :
APPT STATUS          : 1 PERMANENT          AGY  EFF/END DATE: 07 01 1998
PAY METHOD           : D PAYROLL DEDUCT     MONTHLY SALARY    :  4444.00

MARITAL STATUS       : S                    DECEASED     DATE:
MARRIAGE DATE        :                      RETIRED      DATE:
SPOUSE DIV/DEC DATE:                        SPOUSE DIV/DEC REASON:

NEXT FUNCTION: A 43 TYPE: I SSA: 123 45 6789  AGY: 107 SUB:      PAY ACTION:
INQUIRY ONLY      ENTER-NXT, PF1-HELP, PF2-RETURN, PF3-SYSTEM, PF9-HISTORY
```

Note: Use the TAB button to move through the different fields.

HR
WSD Personnel

Appointment Change - Date Overview

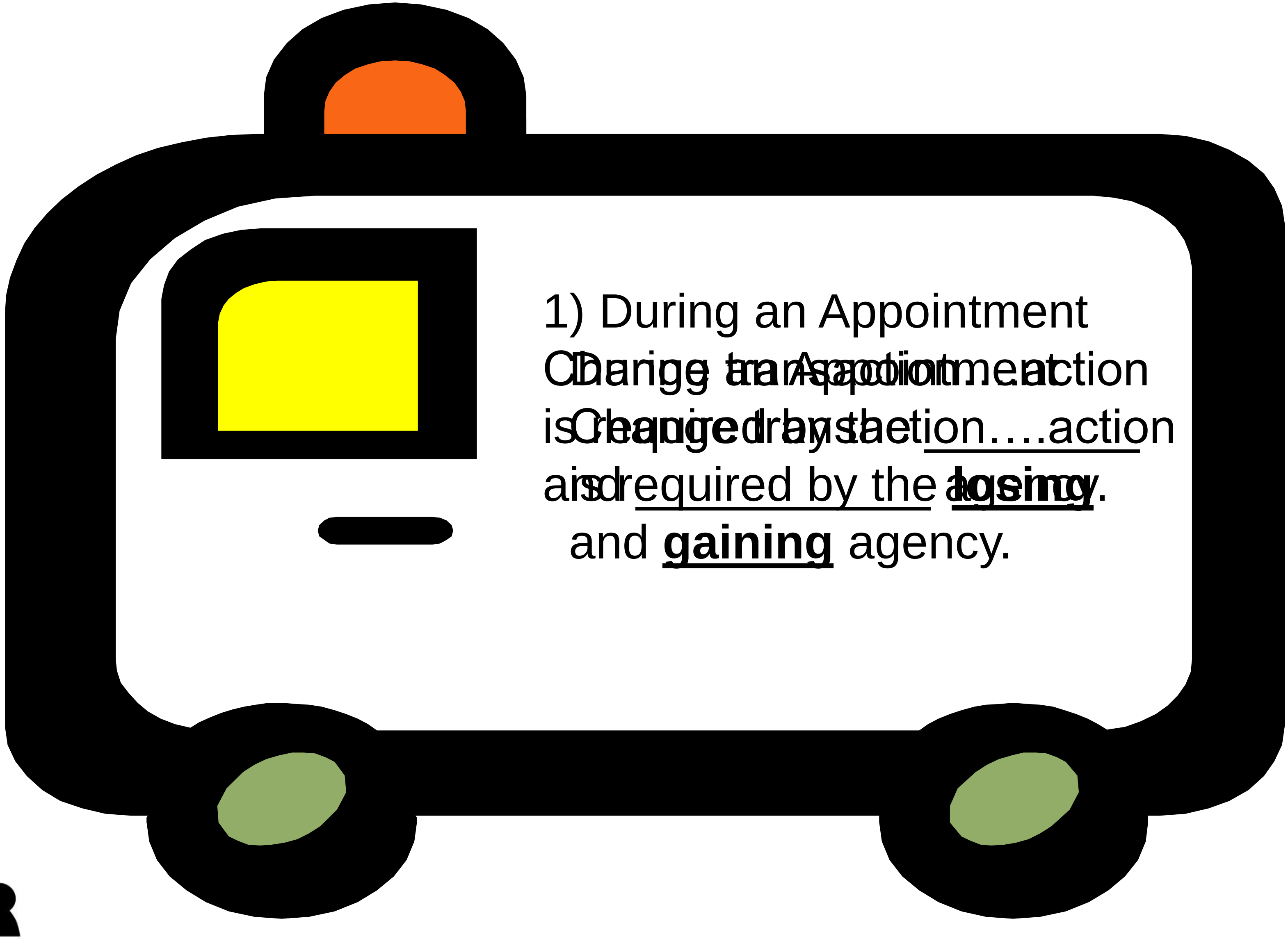
- If the gaining agency picks up the employee on 3/16, they are responsible for paying the insurances for the first time on 4/10.
  - Insurance is valid 4/1 – 4/30

- When a transfer occurs prior to the end of the month, the losing agency is responsible for paying the state share for the entire month. The gaining agency will not be billed for state share until the month following the transfer date.

Appointment Change – Date Overview – cont’d

- When an employee transfers to an agency on the 1st, communication between the losing and gaining agency is very important. Depending on the agency’s business process the losing agency does an offset for the 10th and the gaining agency sets up a double deduction to deduct on the 25th.
  - The losing agency can also JV funds from the 10th to the gaining agency who will then process the JV.

Review Questions



1) During an Appointment Change transaction…..action is required by the ________ and ________ agency.

During an Appointment Change transaction….action is required by the **losing** and **gaining** agency.

Health Care Benefits – Separation

Health Care Benefits – Separation

Upon completion of this section, you will be able to:

- Understand the key terms and concepts associated with an Employee Separation
- Explain the overall business process flow of a Separation action
- Navigate through the transaction in PAY1 and in HRMS

Separations – Key Terms

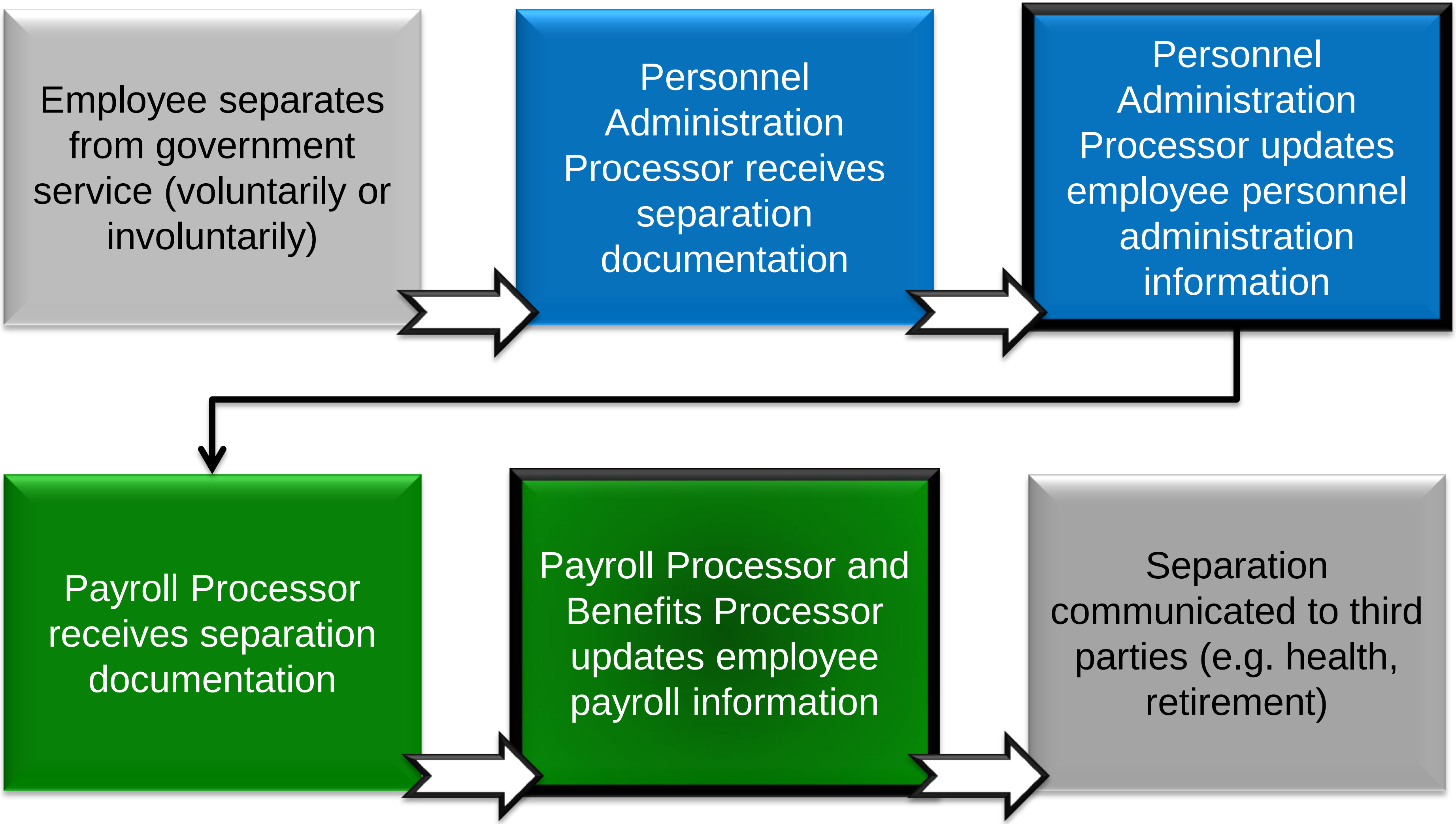
- A **separation** occurs when an employee discontinues his/her employment with the state of Washington
  - Can be either voluntary or involuntary

- There are three main types of separations:
  - **Retirement** - A voluntary separation from employment with the state of Washington based on years of service and eligibility
  - **Resignation** - A voluntary separation from employment with the state of Washington
  - **Termination** - An involuntary separation from employment with the state of Washington

Health Care Benefits – Separations

- When an employee separates, for any reason, the PAY1 – A.41 screen needs to be updated by the losing agency
- Updating this information ensures that the benefits payments are not billed to an agency after an employee leaves

Separation Process Flow



Employee separates from government service (voluntarily or involuntarily)

Personnel Administration Processor receives separation documentation

Personnel Administration Processor updates employee personnel administration information

Payroll Processor receives separation documentation

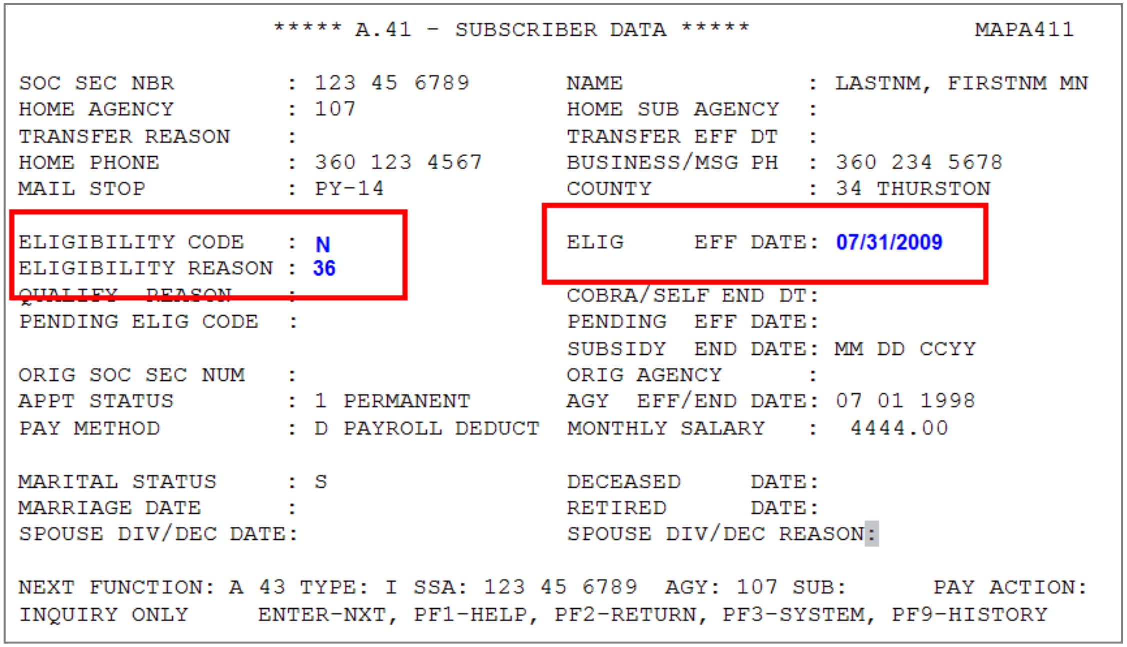
Payroll Processor and Benefits Processor updates employee payroll information

Separation communicated to third parties (e.g. health, retirement)

Legend: ☐ HRMS Entry 🟦 HR 🟩 Payroll/Benefits

Health Care Benefits – Separation

- To terminate the employee's health insurance, access the PAY1 – A.41 screen
- Fields to complete:
  - **Elig. Code**
    - N
  - **Elig. Reason**
  - **Elig. Eff Date**
    - Last day of the month
- **<u>F10</u>** to update



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                   ***** A.41 - SUBSCRIBER DATA *****                MAPA411

SOC SEC NBR         : 123 45 6789        NAME              : LASTNM, FIRSTNM MN
HOME AGENCY         : 107                HOME SUB AGENCY   :
TRANSFER REASON     :                    TRANSFER EFF DT   :
HOME PHONE          : 360 123 4567       BUSINESS/MSG PH   : 360 234 5678
MAIL STOP           : PY-14              COUNTY            : 34 THURSTON

ELIGIBILITY CODE    : N                  ELIG      EFF DATE: 07/31/2009
ELIGIBILITY REASON  : 36
QUALIFY  REASON     :                    COBRA/SELF END DT:
PENDING ELIG CODE   :                    PENDING   EFF DATE:
                                         SUBSIDY   END DATE: MM DD CCYY
ORIG SOC SEC NUM    :                    ORIG AGENCY       :
APPT STATUS         : 1 PERMANENT        AGY  EFF/END DATE: 07 01 1998
PAY METHOD          : D PAYROLL DEDUCT   MONTHLY SALARY    :  4444.00

MARITAL STATUS      : S                  DECEASED     DATE:
MARRIAGE DATE       :                    RETIRED      DATE:
SPOUSE DIV/DEC DATE:                     SPOUSE DIV/DEC REASON:

NEXT FUNCTION: A 43 TYPE: I SSA: 123 45 6789  AGY: 107 SUB:      PAY ACTION:
INQUIRY ONLY     ENTER-NXT, PF1-HELP, PF2-RETURN, PF3-SYSTEM, PF9-HISTORY
```

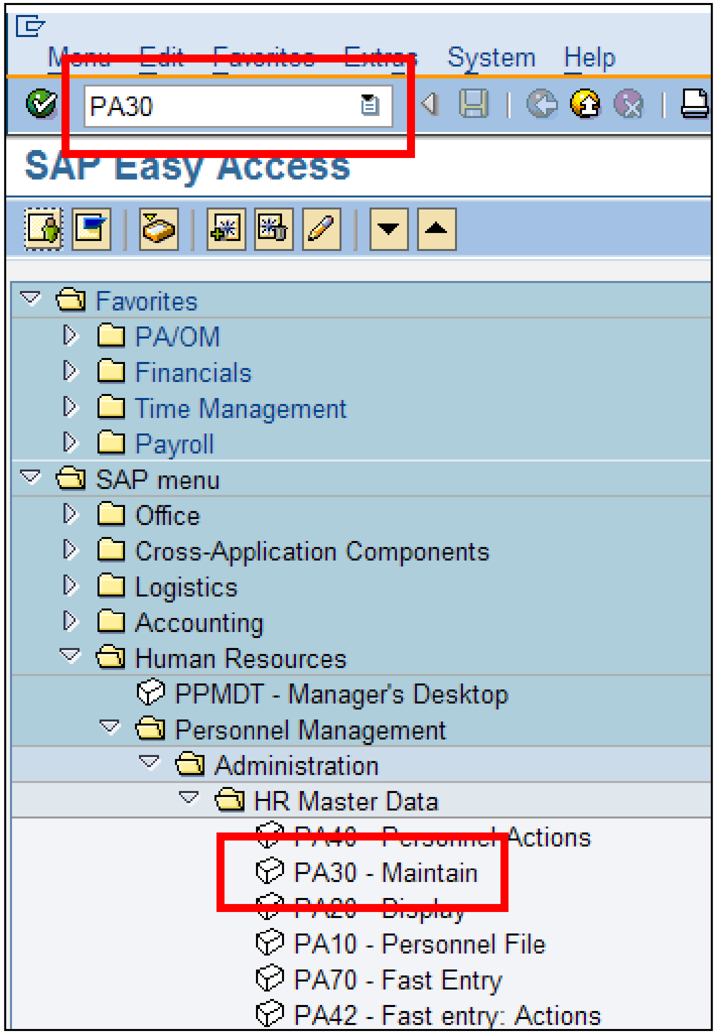
Note: Remember to deduct the full premium from their last paycheck.

Health Care Benefits - Separation

- During the Separation action (PA40) in HRMS, the employee’s Health Insurance plans will not appear and will need to be delimited (end dated) manually. See the OLQR User Procedure, Separation Action.
  - *Health Plans* (0167)
    - Medical and Dental
  - *Miscellaneous Plans* (0377)
    - LTD, Life and Auto/Home Insurance

Maintain Health Plans (0167)

- To maintain Employee information using the menu path:
  - Follow Human Resources → Personnel Management → Administration → HR Master Data → Maintain
  - Or enter transaction code **PA30** in the **Command** field

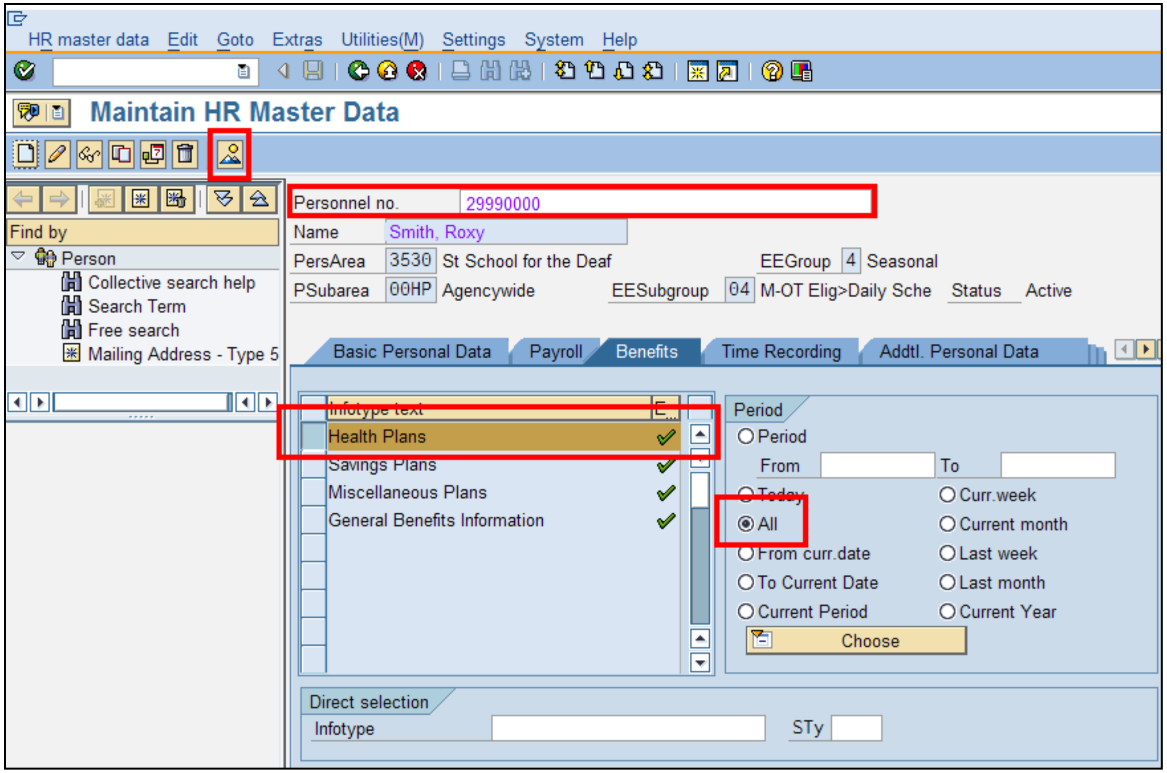


PA30

Menu Edit Favorites Extras System Help
SAP Easy Access
Favorites
PA/OM
Financials
Time Management
Payroll
SAP menu
Office
Cross-Application Components
Logistics
Accounting
Human Resources
PPMDT - Manager's Desktop
Personnel Management
Administration
HR Master Data
PA40 - Personnel Actions
PA30 - Maintain
PA20 - Display
PA10 - Personnel File
PA70 - Fast Entry
PA42 - Fast entry: Actions

Access *Health Plans* (0167)

1. Enter the *Personnel no.* and click **(Enter)** to validate
2. Select the **Benefits** tab
3. Click the gray box to the left of the *Health Plans* (0167) to select
4. In the Period section, click “All”
5. Click **(Overview)** for an overview of all actions associated with *Health Plans* (0167)



HR master data
Edit
Goto
Extras
Utilities(M)
Settings
System
Help
Maintain HR Master Data
Find by
Person
Collective search help
Search Term
Free search
Mailing Address - Type 5
Basic Personal Data
Payroll
Benefits
Time Recording
Addtl. Personal Data
Infotype text
Choose
Direct selection
Infotype
STy

Personnel no. 29990000
Name Smith, Roxy
PersArea 3530 St School for the Deaf
EEGroup 4 Seasonal
PSubarea 00HP Agencywide
EESubgroup 04 M-OT Elig>Daily Sche
Status Active

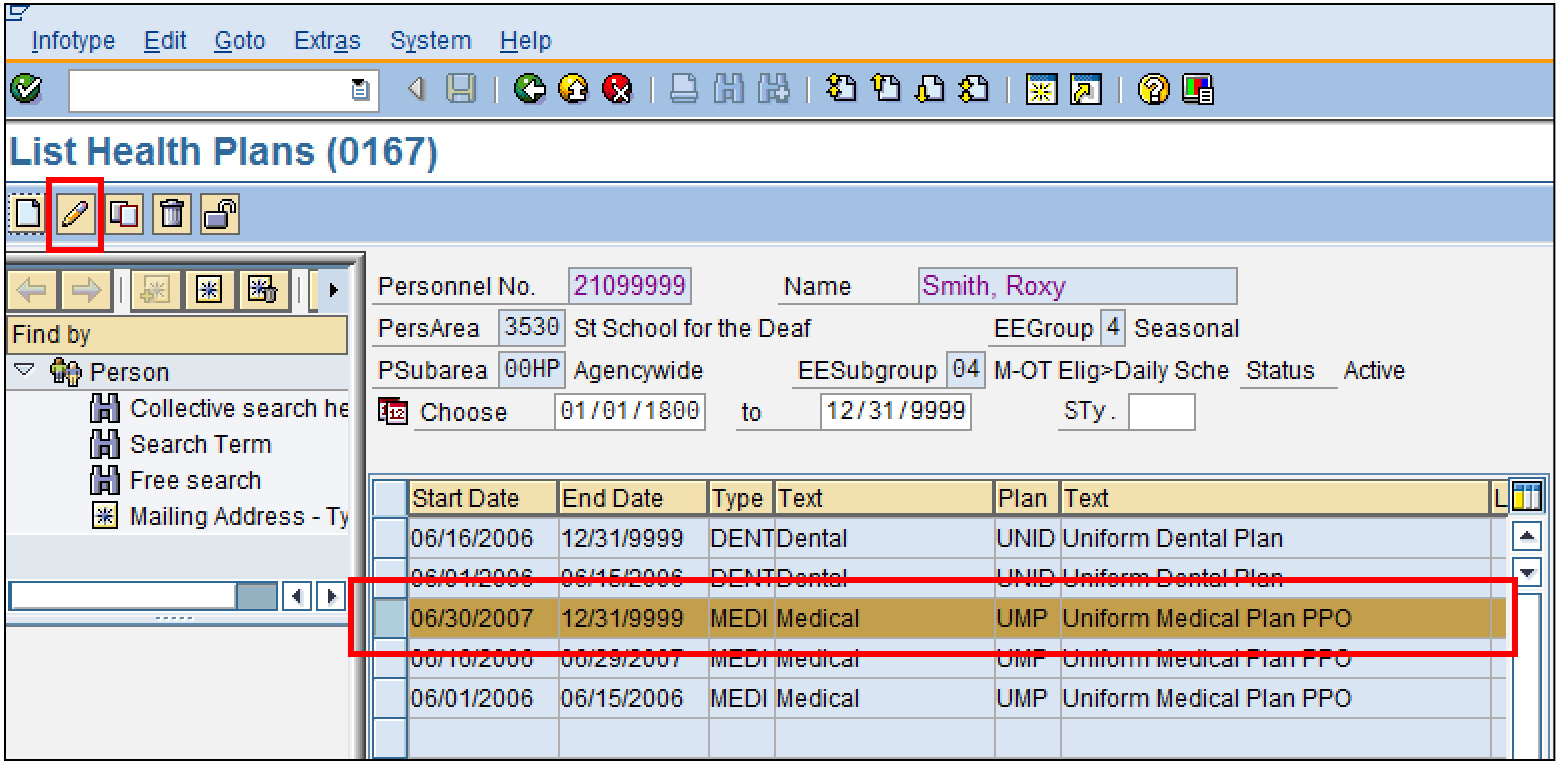
Infotype text	
Health Plans	✓
Savings Plans	✓
Miscellaneous Plans	✓
General Benefits Information	✓

Period
○ Period
From ___ To ___
○ Today
● All
○ From curr.date
○ To Current Date
○ Current Period
○ Curr.week
○ Current month
○ Last week
○ Last month
○ Current Year

HR
WSD Personnel

List *Health Plans* (0167)

6. Click the gray box to the left of the current health plan record (End date will be 12/31/9999)
7. Click ✎ **(Change)** to change the record



Infotype Edit Goto Extras System Help

List Health Plans (0167)

Find by
Person
Collective search he
Search Term
Free search
Mailing Address - Ty

Personnel No. 21099999 Name Smith, Roxy

PersArea 3530 St School for the Deaf EEGroup 4 Seasonal

PSubarea 00HP Agencywide EESubgroup 04 M-OT Elig>Daily Sche Status Active

Choose 01/01/1800 to 12/31/9999 STy.

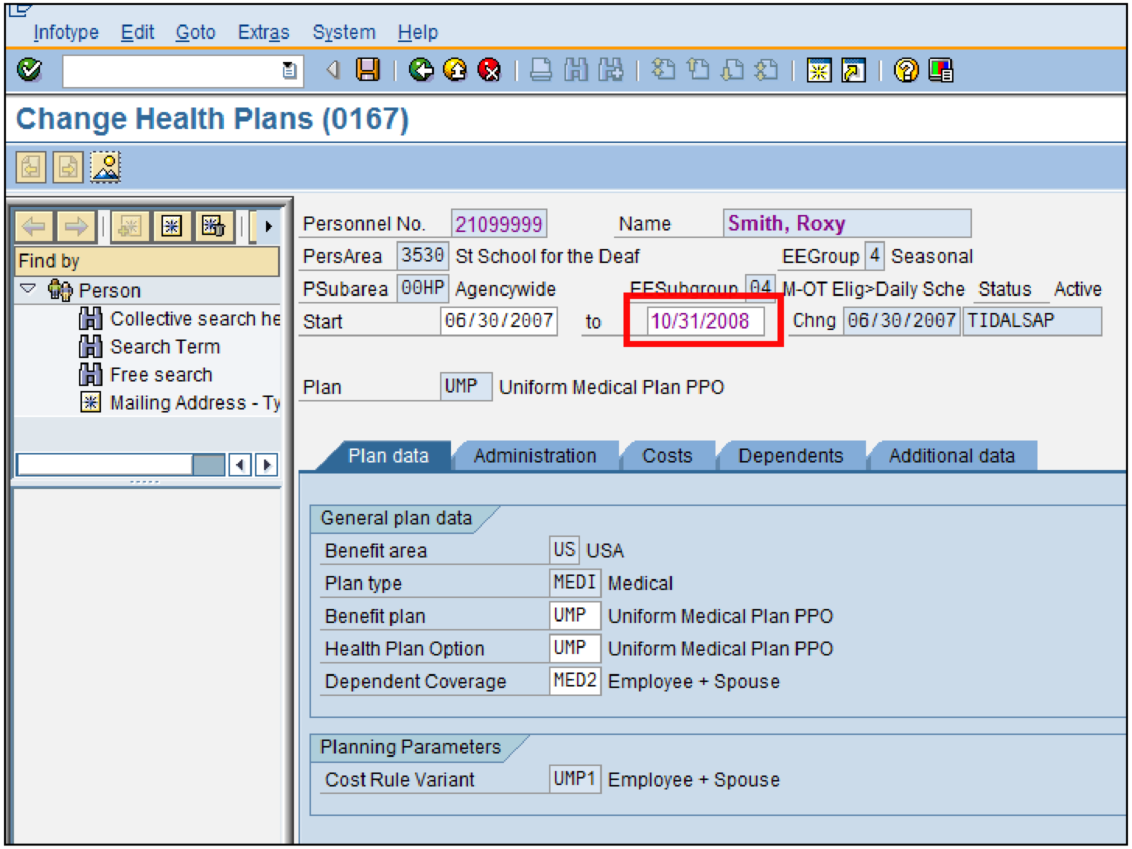
Start Date	End Date	Type	Text	Plan	Text
06/16/2006	12/31/9999	DENT	Dental	UNID	Uniform Dental Plan
06/01/2006	06/15/2006	DENT	Dental	UNID	Uniform Dental Plan
06/30/2007	12/31/9999	MEDI	Medical	UMP	Uniform Medical Plan PPO
06/16/2006	06/29/2007	MEDI	Medical	UMP	Uniform Medical Plan PPO
06/01/2006	06/15/2006	MEDI	Medical	UMP	Uniform Medical Plan PPO

Change *Health Plans* (0167)

8. In the ***to*** (date) field, enter the end date of the record

9. Click ✓ **(Enter)** to validate the information and click 💾 **(Save)** to save

Note: Health Plans should have an end date of the last day of the month. Also these steps should be repeated to end Dental plans.



Infotype Edit Goto Extras System Help
Change Health Plans (0167)
Find by
Person
Collective search he
Search Term
Free search
Mailing Address - Ty
Plan data
Administration
Costs
Dependents
Additional data
General plan data
Planning Parameters

Personnel No. 21099999 Name Smith, Roxy

PersArea 3530 St School for the Deaf EEGroup 4 Seasonal

PSubarea 00HP Agencywide EESubgroup 04 M-OT Elig>Daily Sche Status Active

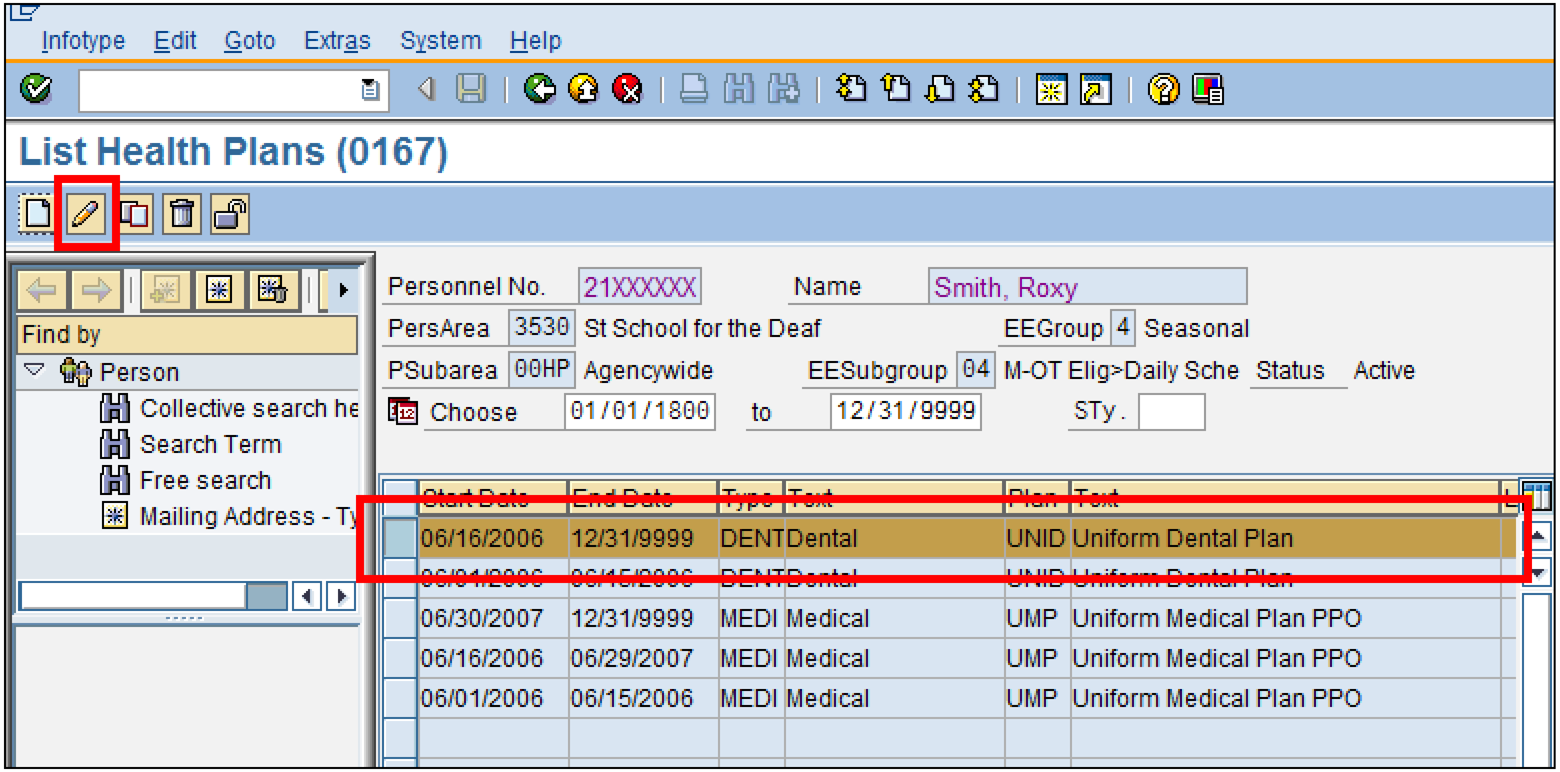
Start 06/30/2007 to 10/31/2008 Chng 06/30/2007 TIDALSAP

Plan UMP Uniform Medical Plan PPO

Benefit area	US	USA
Plan type	MEDI	Medical
Benefit plan	UMP	Uniform Medical Plan PPO
Health Plan Option	UMP	Uniform Medical Plan PPO
Dependent Coverage	MED2	Employee + Spouse
Cost Rule Variant	UMP1	Employee + Spouse

List *Health Plans* (0167)

- Once the infotype has been saved, you will be taken back to *List Health Plans* (0167)
- Repeat Steps 6 – 9 to delimit (end date) the remaining plan


Infotype
Edit
Goto
Extras
System
Help
List Health Plans (0167)
Find by
Person
Collective search he
Search Term
Free search
Mailing Address - Ty

Personnel No. 21XXXXXX Name Smith, Roxy
PersArea 3530 St School for the Deaf EEGroup 4 Seasonal
PSubarea 00HP Agencywide EESubgroup 04 M-OT Elig>Daily Sche Status Active
Choose 01/01/1800 to 12/31/9999 STy.

Start Date	End Date	Type	Text	Plan	Text
06/16/2006	12/31/9999	DENT	Dental	UNID	Uniform Dental Plan
06/01/2006	06/15/2006	DENT	Dental	UNID	Uniform Dental Plan
06/30/2007	12/31/9999	MEDI	Medical	UMP	Uniform Medical Plan PPO
06/16/2006	06/29/2007	MEDI	Medical	UMP	Uniform Medical Plan PPO
06/01/2006	06/15/2006	MEDI	Medical	UMP	Uniform Medical Plan PPO

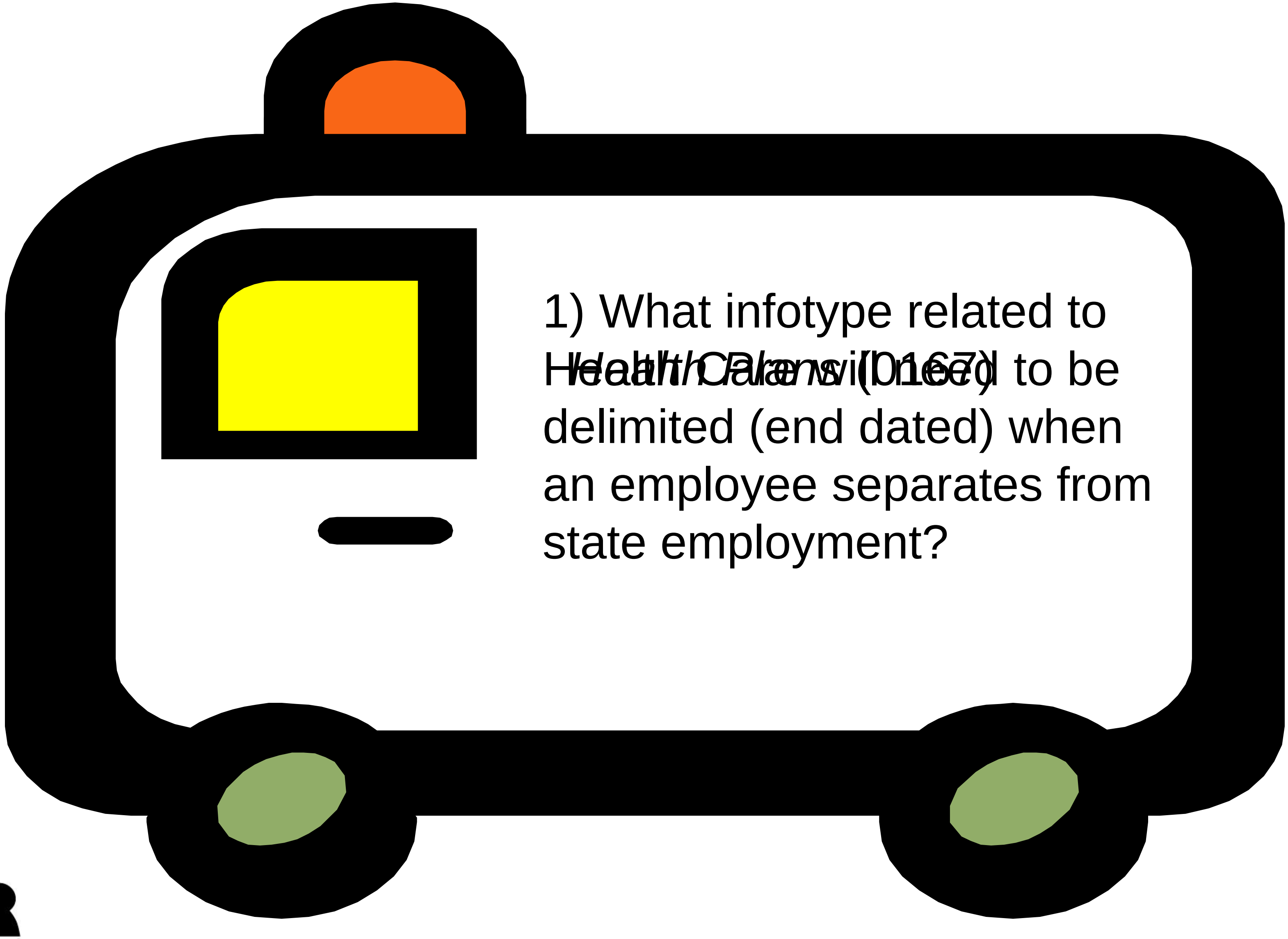
HRMS Activity

Separation – Health Plans

Health Care Benefits - Separation

- Health Insurance premiums are collected each pay period and if the employee leaves prior to the second pay date, the employee will still need to pay their Health Benefits portion.

Review Questions



1) What infotype related to Health Care will need to be delimited (end dated) when an employee separates from state employment?

Health Plans (0167)

Health Care Benefits – Mid-Period Transfers

Health Care Benefits – Mid-Period Transfer

- Department of Enterprise Services encourages managers to make hiring and termination dates align with pay periods (**1st or 16th**) when possible due to the complicated involvement for payroll processors of the losing and gaining agencies.
- In HRMS, when an employee transfers mid-period (Appointment Change), a single warrant / EFT is processed for that period. The agency that receives the transferring employee reports the entire pay period taxes and most deductions.
  - The monies are automatically transferred from the losing agency to the gaining agency to cover their portion of the costs on the period.

Health Care Benefits – Mid-Period Transfer

- During a mid-period transfer, the deduction and expenditure is calculated based on the employee’s location on the last day of the pay period.
- Regardless of which agency records the expenditure, the deduction and expenditure is recorded in the gaining agency revolving general ledger.
  - A journal voucher to transfer the funds may be required.

Health Care Benefits – Mid-Period Transfer

- In HRMS, employee deductions and employer expenditures are recorded and accrued in General Ledger 5181 on the 10th and 25th. The journal voucher to transfer health insurance to HCA is completed around the 25th.

Mid-Period – Important Notes

- The gaining agency owns an employee’s net pay after a transfer is made.
- After payroll is run, the losing agency no longer owns the employee.
  - The losing agency will see adjustments on the expenditure reports. They will also get transfer Journal Vouchers (transfer of money from losing agency to gaining agency) as a record.

Note: The losing agency will have a 15-day period to view the employee’s history once transferred or separated.

Mid Period Transfers Timing

- **Scenario:**

  An employee transfer to a new agency effective the 26th of the month. The losing agency is responsible for the 16th – 25th and the gaining agency will pay for the remainder of the pay period. The health insurance is pushed to the gaining agency and an automated JV is created.

- HRMS apportions the employer costs for employees that are paid by two agencies according to the time paid by each agency.
  - **The Posting Report (ZHR_RPTPY126)** can be used to research the amounts that were expensed by each agency for these employer costs.
  - **The Payroll Journal Voucher report (ZHR_RPTPY376)** will identify any funds that are being transferred in and out of your agency's account.

Health Care Benefits – Qualified Domestic Partner Benefit Status

Qualified Domestic Partner Benefits

- The Qualified Domestic Partner status information is entered and maintained in *Health Plans* (0167)
  - **Prerequisites:** Dental and Medical plans must already be created
- Dental and Medical insurance coverage updates will be done by an interface from HCA
  - Changes to medical and dental insurance coverage should not be done in HRMS except when changing the dependent coverage to Qualified Domestic Partner (QDP), Children, or Family

Qualified Domestic Partner Benefits

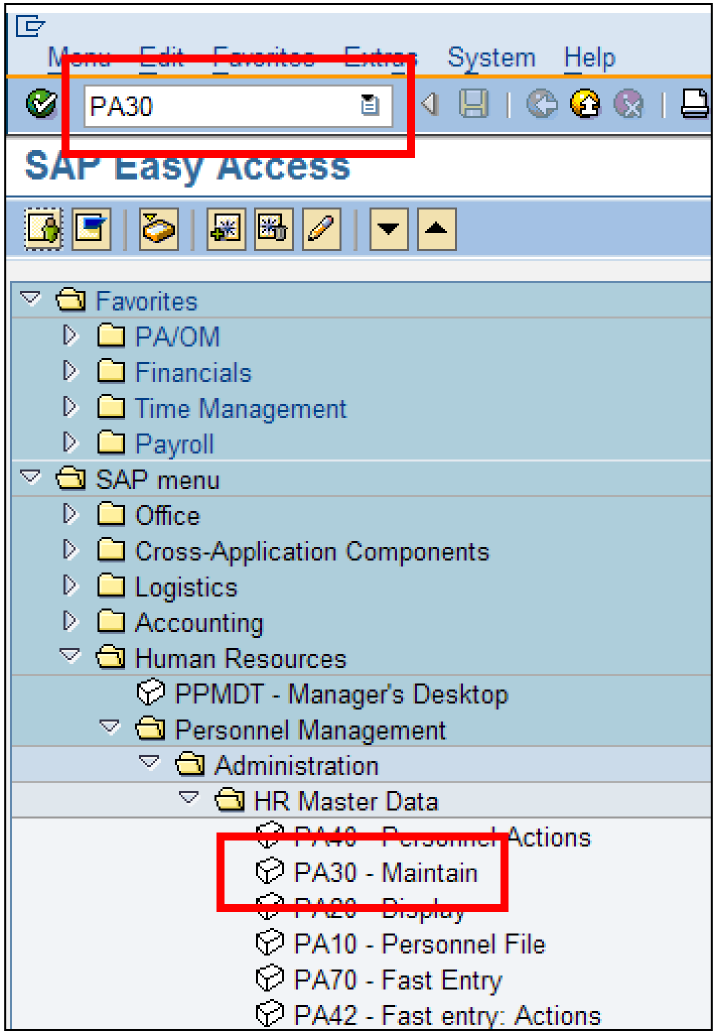
The following codes are available depending on the employee's dependent coverage selection:

Option	Medical Codes	Dental Codes
1. Employee + non-qualified	MED5	DEN1
2. Employee + non-qualified children	MED6	DEN2
3. Employee + non-qualified family	MED7	DEN3
4. Employee + Child + non-qualified	MED8	DEN4

Note: HCA's interface will only update an employee's dependent coverage to the following: Employee + Spouse, Employee + Children, or Employee + Family.

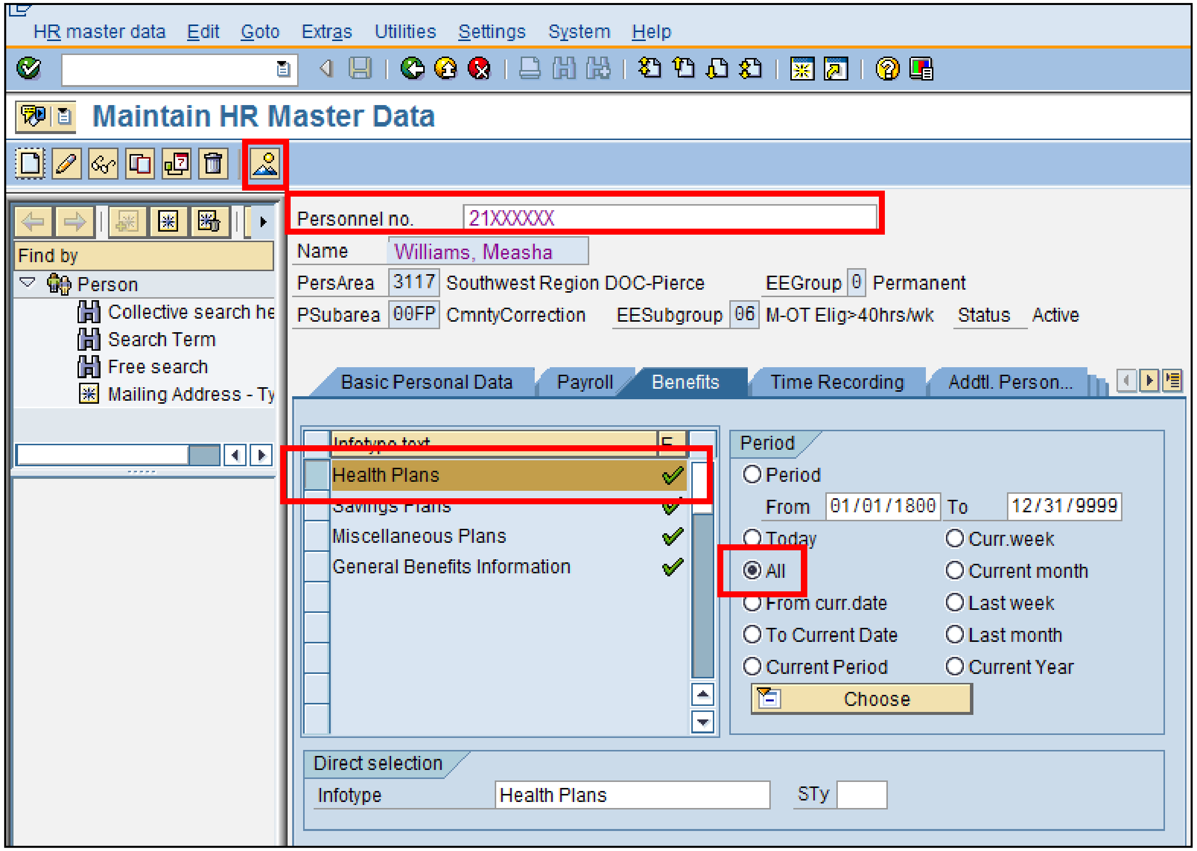
Maintain *Health Plans* (0167)

- To maintain Employee information using the menu path:
  - Follow Human Resources → Personnel Management → Administration → HR Master Data → Maintain
  - Or enter transaction code **PA30** in the Command field


Menu Edit Favorites Extras System Help
PA30
SAP Easy Access
Favorites
PA/OM
Financials
Time Management
Payroll
SAP menu
Office
Cross-Application Components
Logistics
Accounting
Human Resources
PPMDT - Manager's Desktop
Personnel Management
Administration
HR Master Data
PA40 - Personnel Actions
PA30 - Maintain
PA20 - Display
PA10 - Personnel File
PA70 - Fast Entry
PA42 - Fast entry: Actions

Access *Health Plans* (0167)

- Enter the Personnel no. and click **(Enter)** to validate
- Click the **Benefits** tab
- Click the gray box to the left of the *Health Plans* (0167) to select
- In the Period section, click “All”
- Click **(Overview)** for an overview of all actions associated with *Health Plans* (0167)


HR master data
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Utilities
Settings
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Collective search he
Search Term
Free search
Mailing Address - Ty
Basic Personal Data
Payroll
Benefits
Time Recording
Addtl. Person...
Infotype text
Choose
Direct selection

Personnel no. 21XXXXXX
Name Williams, Measha
PersArea 3117 Southwest Region DOC-Pierce
EEGroup 0 Permanent
PSubarea 00FP CmntyCorrection
EESubgroup 06 M-OT Elig>40hrs/wk
Status Active

Infotype text	S
Health Plans	✓
Savings Plans	✓
Miscellaneous Plans	✓
General Benefits Information	✓

Period

○ Period
From 01/01/1800 To 12/31/9999

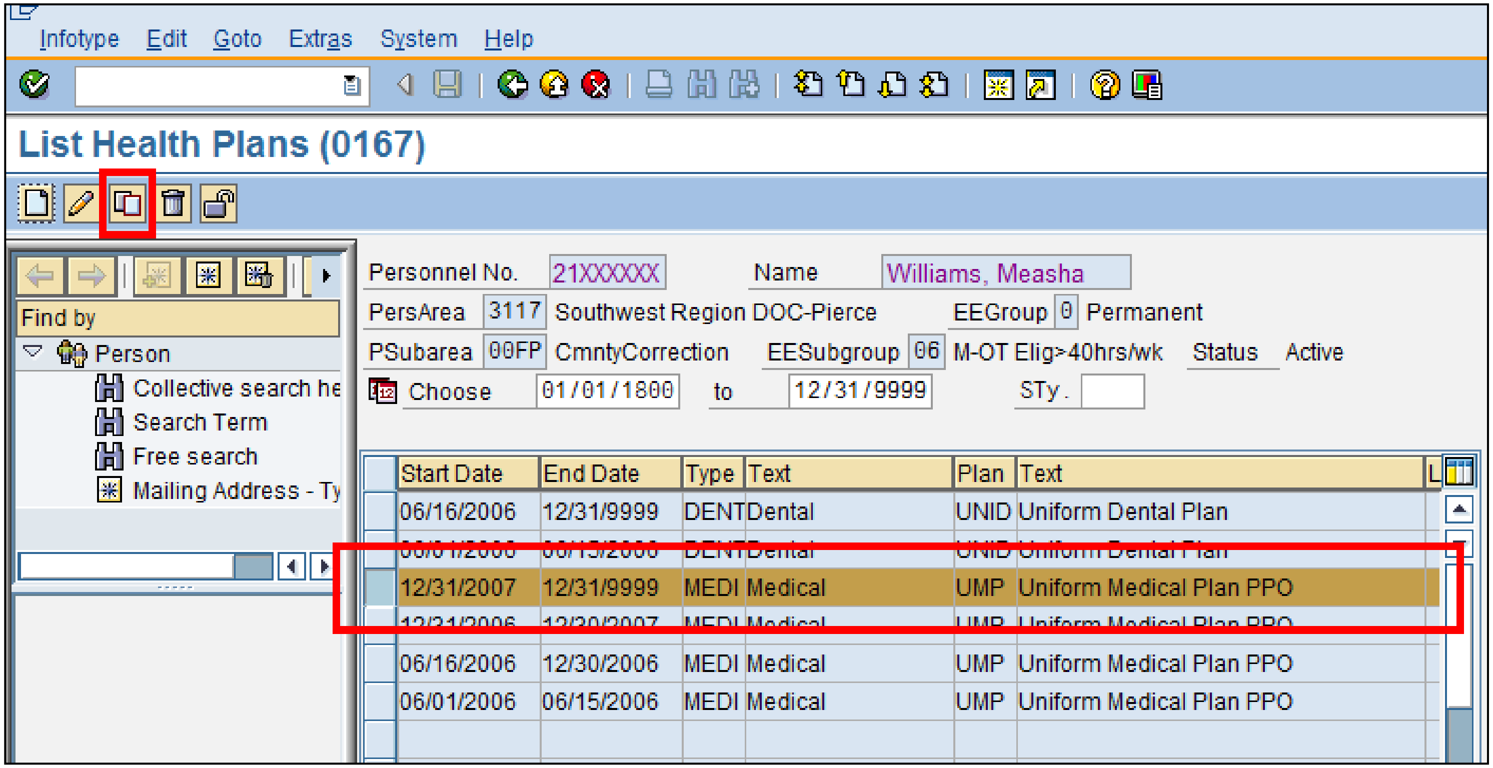
○ Today	○ Curr.week
● All	○ Current month
○ From curr.date	○ Last week
○ To Current Date	○ Last month
○ Current Period	○ Current Year

Infotype Health Plans
STy

Note: The Dental and/or Medical plan should already be set-up in *Health Plans* (0167).

List *Health Plans* (0167)

- Click the gray box to the left of the current health plan record (End date will be 12/31/9999)
- Click **(Copy)** to copy and continue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Find by
Person
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Search Term
Free search
Mailing Address - Ty

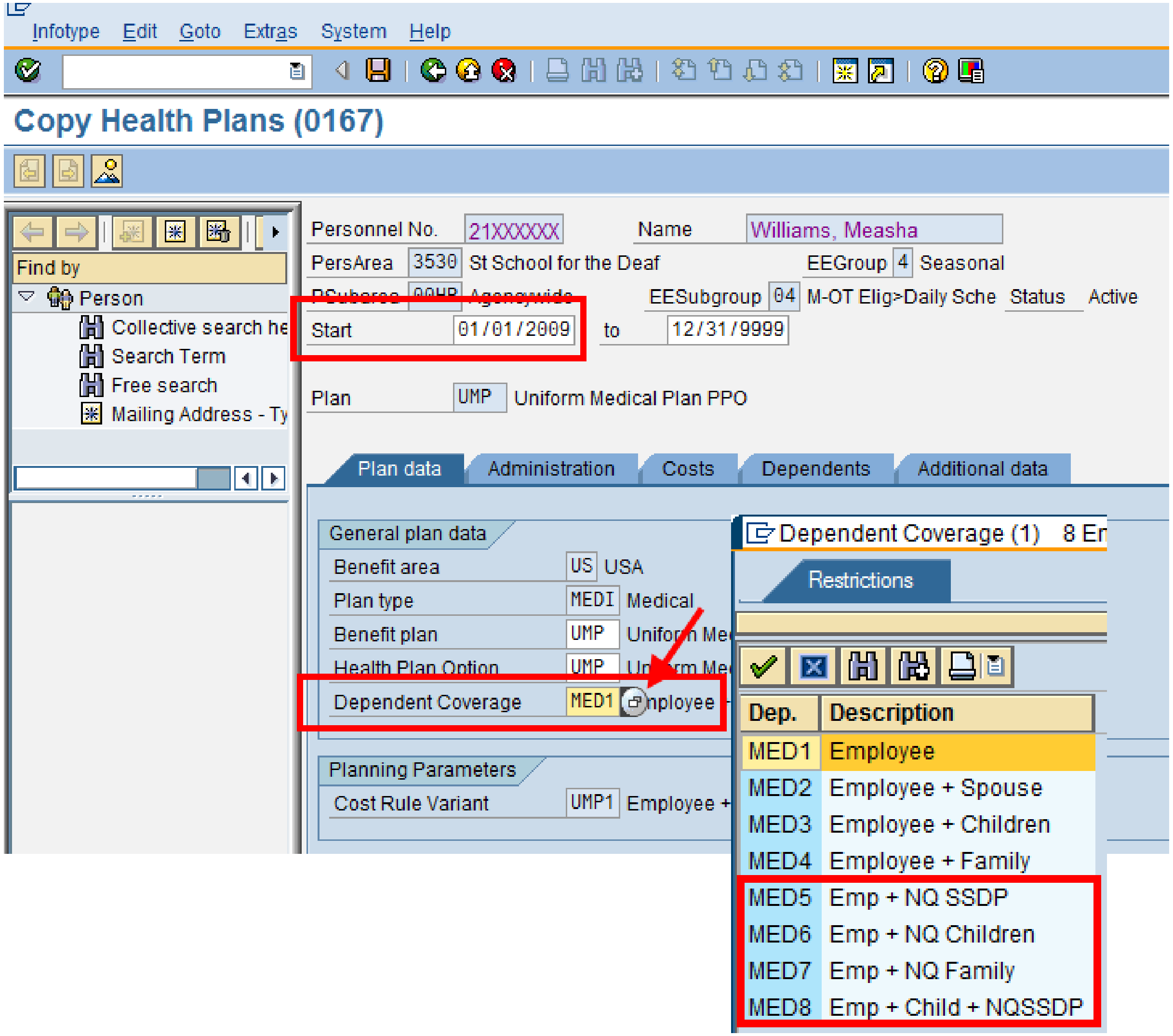
List Health Plans (0167)

Personnel No. 21XXXXXX Name Williams, Measha
PersArea 3117 Southwest Region DOC-Pierce EEGroup 0 Permanent
PSubarea 00FP CmntyCorrection EESubgroup 06 M-OT Elig>40hrs/wk Status Active
Choose 01/01/1800 to 12/31/9999 STy.

Start Date	End Date	Type	Text	Plan	Text
06/16/2006	12/31/9999	DENT	Dental	UNID	Uniform Dental Plan
06/01/2006	06/15/2006	DENT	Dental	UNID	Uniform Dental Plan
12/31/2007	12/31/9999	MEDI	Medical	UMP	Uniform Medical Plan PPO
12/31/2006	12/30/2007	MEDI	Medical	UMP	Uniform Medical Plan PPO
06/16/2006	12/30/2006	MEDI	Medical	UMP	Uniform Medical Plan PPO
06/01/2006	06/15/2006	MEDI	Medical	UMP	Uniform Medical Plan PPO

Access *Health Plans* (0167)

- Enter a Start date if applicable
- In the **Dependent Coverage** field, double-click on the appropriate option
- Click ✓ **(Enter)** and click 💾 **(Save)** to save
- Repeat these steps for the other plan if necessary



Infotype
Edit
Goto
Extras
System
Help
Find by
Person
Collective search he
Search Term
Free search
Mailing Address - Ty
Plan data
Administration
Costs
Dependents
Additional data
Restrictions

Copy Health Plans (0167)

Personnel No. 21XXXXXX
Name Williams, Measha
PersArea 3530 St School for the Deaf
EEGroup 4 Seasonal
PSubarea 00HR Agencywide
EESubgroup 04 M-OT Elig>Daily Sche
Status Active
Start 01/01/2009 to 12/31/9999

Plan UMP Uniform Medical Plan PPO

General plan data

Benefit area US USA
Plan type MEDI Medical
Benefit plan UMP Uniform Me
Health Plan Option UMP Uniform Me
Dependent Coverage MED1 Employee

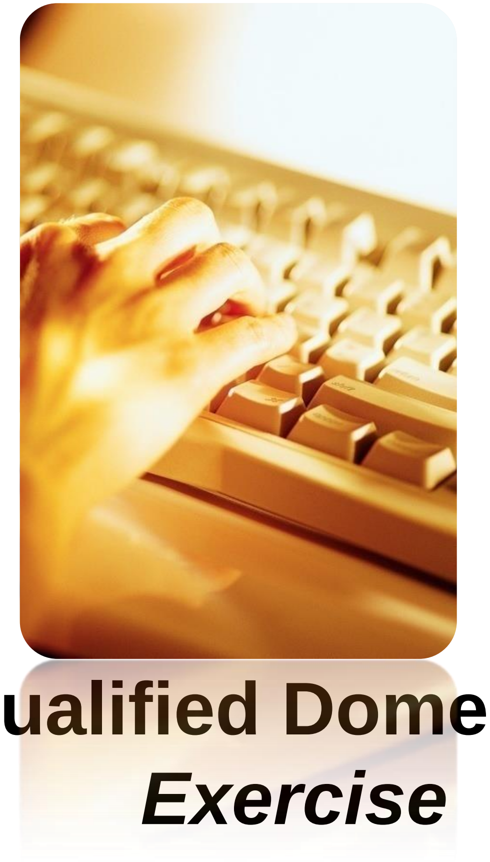
Planning Parameters

Cost Rule Variant UMP1 Employee +

Dependent Coverage (1) 8 En

Dep.	Description
MED1	Employee
MED2	Employee + Spouse
MED3	Employee + Children
MED4	Employee + Family
MED5	Emp + NQ SSDP
MED6	Emp + NQ Children
MED7	Emp + NQ Family
MED8	Emp + Child + NQSSDP

HRMS Activity



Create Qualified Domestic Partner

Exercise

WSD Personnel

Health Care Benefits – Same Gender Marriages Benefit Status

Same Gender marriages - Benefits

- Effective **September 16, 2013**, the IRS ruled that the costs for health insurance are no longer considered taxable income in cases where employees in same gender marriages have spouses and/or the spouse's children covered on their health coverage.
- **Note:** This ruling does **not** apply to domestic partnerships. It **only** applies to same gender- marriages.

- The Same Gender Marriages information is entered and maintained in *Health Plans* (0167)
  - **Prerequisites:** Employees must change their tax status declaration by completing the Declaration of Tax Status form and submitting it to their personnel, payroll or benefits office.
    - Dental and Medical records must already be created

Health Care Benefits – Post-tax Option

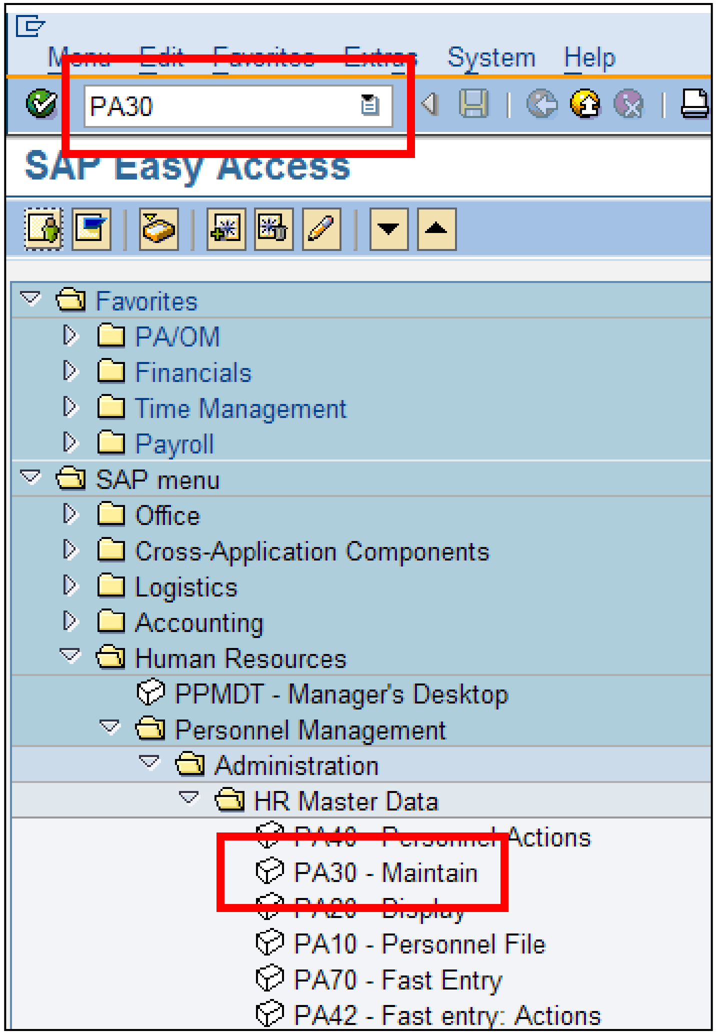
Health Care Benefits Post-Tax Option

- All new employees default to pre-tax deduction status
- Some employees may elect to have their healthcare premium deducted post-tax rather than pre-tax
- Employees can elect this option as a new enrollee or during open enrollment

Note: If a manual entry is made for Health Care enrollment, HRMS defaults to post-tax. Verify the tax deduction status is marked appropriately.

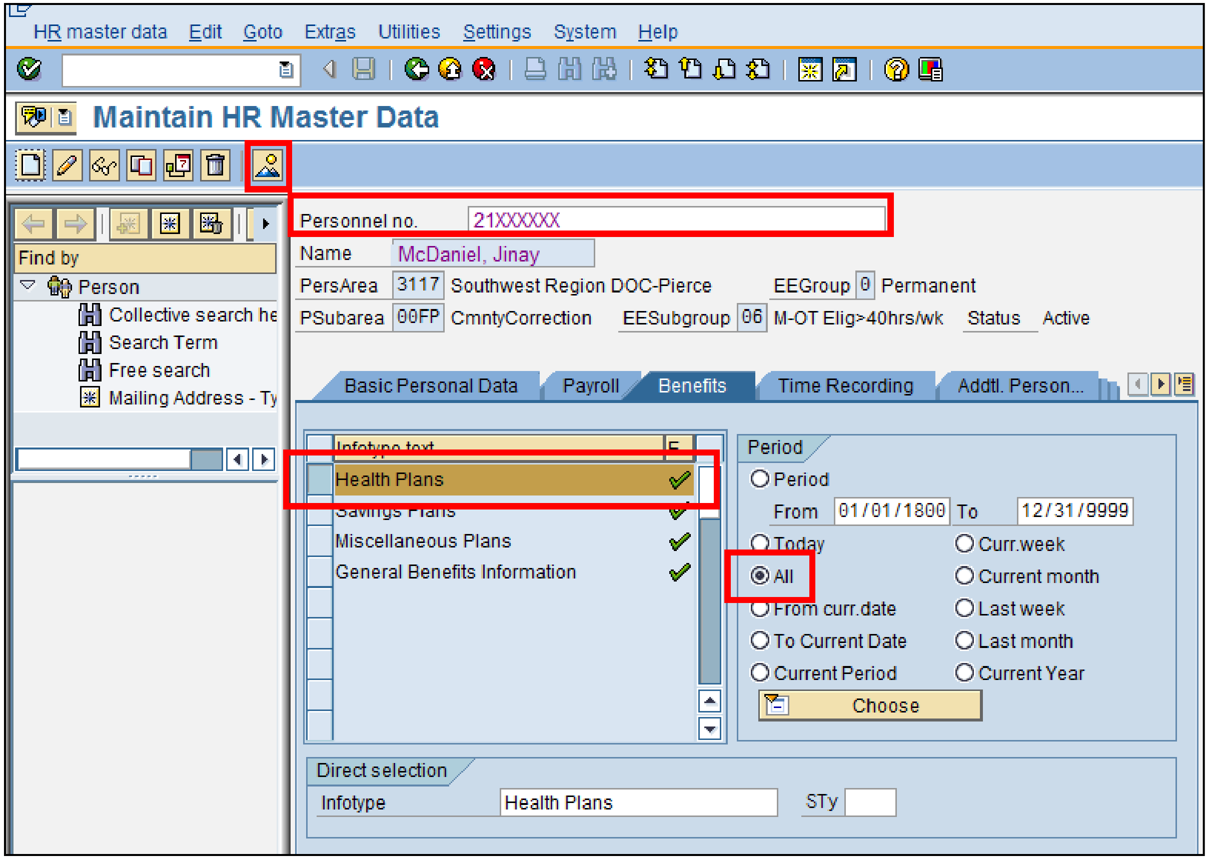
Maintain *Health Plans* (0167)

- To maintain Employee information using the menu path:
  - Follow Human Resources → Personnel Management → Administration → HR Master Data → Maintain
  - Or enter transaction code **PA30** in the **Command** field


Menu
Edit
Favorites
Extras
System
Help
PA30
SAP Easy Access
Favorites
PA/OM
Financials
Time Management
Payroll
SAP menu
Office
Cross-Application Components
Logistics
Accounting
Human Resources
PPMDT - Manager's Desktop
Personnel Management
Administration
HR Master Data
PA40 - Personnel Actions
PA30 - Maintain
PA20 - Display
PA10 - Personnel File
PA70 - Fast Entry
PA42 - Fast entry: Actions

Access *Health Plans* (0167)

- Enter the Personnel no. and click ✓ **(Enter)** to validate
- Click the **Benefits** tab
- Click the gray box to the left of the *Health Plans* (0167) to select
- In the Period section, click “All”
- Click **(Overview)** for an overview of all actions associated with *Health Plans* (0167)


HR master data
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Maintain HR Master Data
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Basic Personal Data
Payroll
Benefits
Time Recording
Addtl. Person...
Choose

Personnel no. 21XXXXXX

Name McDaniel, Jinay

PersArea 3117 Southwest Region DOC-Pierce EEGroup 0 Permanent

PSubarea 00FP CmntyCorrection EESubgroup 06 M-OT Elig>40hrs/wk Status Active

Infotype text	S
Health Plans	✓
Savings Plans	✓
Miscellaneous Plans	✓
General Benefits Information	✓

Period

○ Period

From 01/01/1800 To 12/31/9999

○ Today ○ Curr.week

● All ○ Current month

○ From curr.date ○ Last week

○ To Current Date ○ Last month

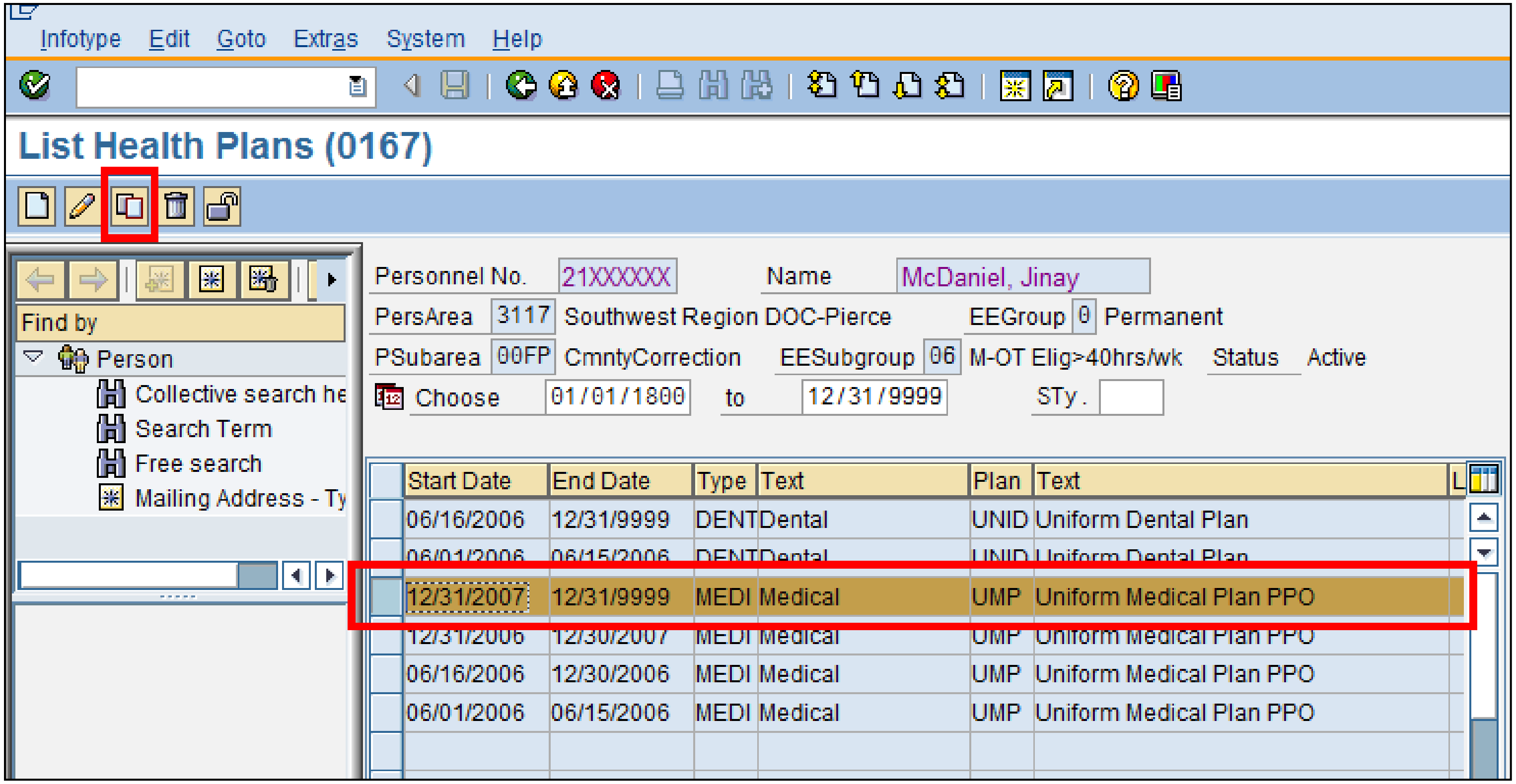
○ Current Period ○ Current Year

Direct selection

Infotype Health Plans STy

List *Health Plans* (0167)

- Click the gray box to the left of the current health plan record (End date will be 12/31/9999)
- Click **(Copy)** to copy and continue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List Health Plans (0167)

Personnel No. 21XXXXXX Name McDaniel, Jinay

PersArea 3117 Southwest Region DOC-Pierce EEGroup 0 Permanent

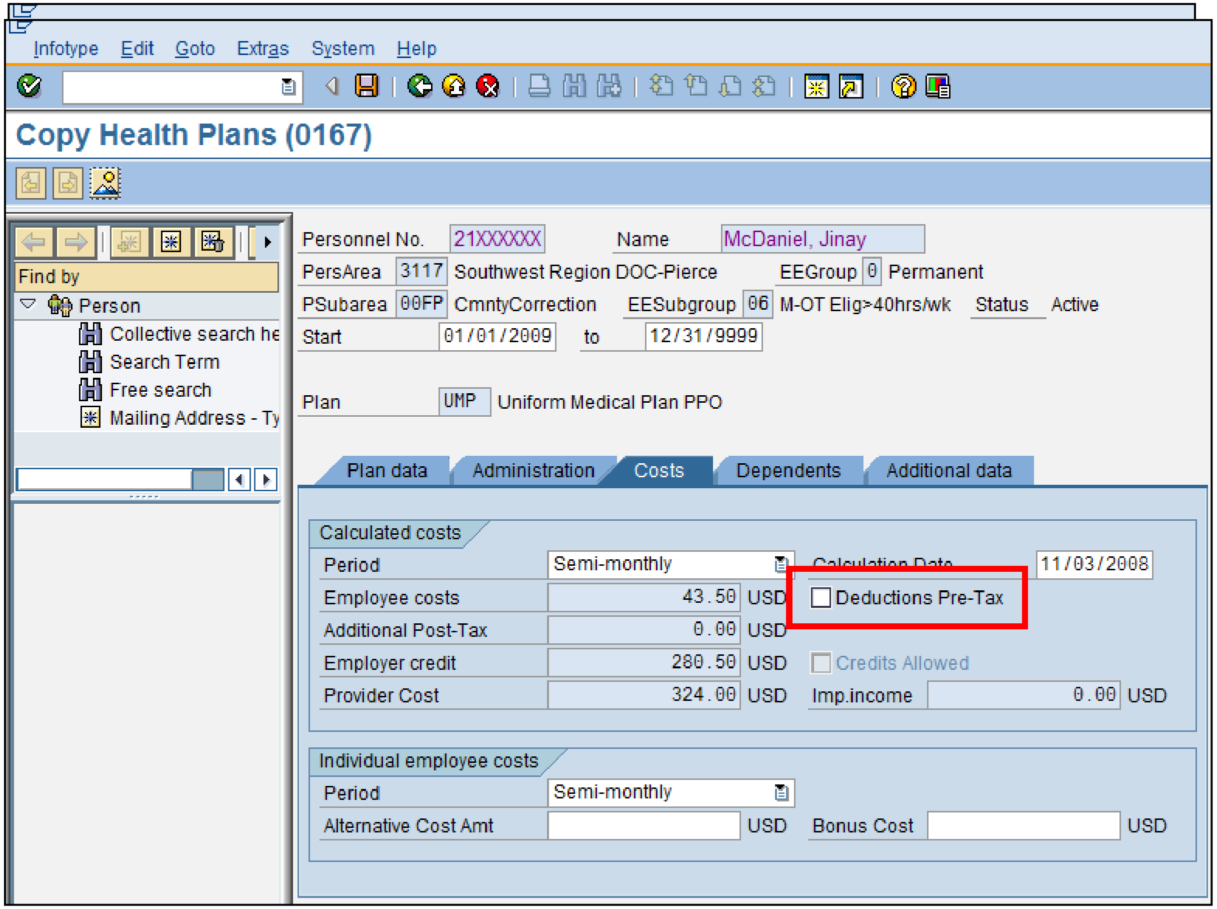
PSubarea 00FP CmntyCorrection EESubgroup 06 M-OT Elig>40hrs/wk Status Active

Choose 01/01/1800 to 12/31/9999 STy.

Start Date	End Date	Type	Text	Plan	Text
06/16/2006	12/31/9999	DENT	Dental	UNID	Uniform Dental Plan
06/01/2006	06/15/2006	DENT	Dental	UNID	Uniform Dental Plan
12/31/2007	12/31/9999	MEDI	Medical	UMP	Uniform Medical Plan PPO
12/31/2006	12/30/2007	MEDI	Medical	UMP	Uniform Medical Plan PPO
06/16/2006	12/30/2006	MEDI	Medical	UMP	Uniform Medical Plan PPO
06/01/2006	06/15/2006	MEDI	Medical	UMP	Uniform Medical Plan PPO

Access *Health Plans* (0167)

- Enter the Start date of the record
- Click the **Costs** tab
- Uncheck the **Deduction Pre-Tax** option
- Click ✓ **(Enter)** and click 💾 **(Save)** to save


Infotype Edit Goto Extras System Help
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Plan data
Administration
Costs
Dependents
Additional data

Copy Health Plans (0167)

Personnel No. 21XXXXXX Name McDaniel, Jinay
PersArea 3117 Southwest Region DOC-Pierce EEGroup 0 Permanent
PSubarea 00FP CmntyCorrection EESubgroup 06 M-OT Elig>40hrs/wk Status Active
Start 01/01/2009 to 12/31/9999

Plan UMP Uniform Medical Plan PPO

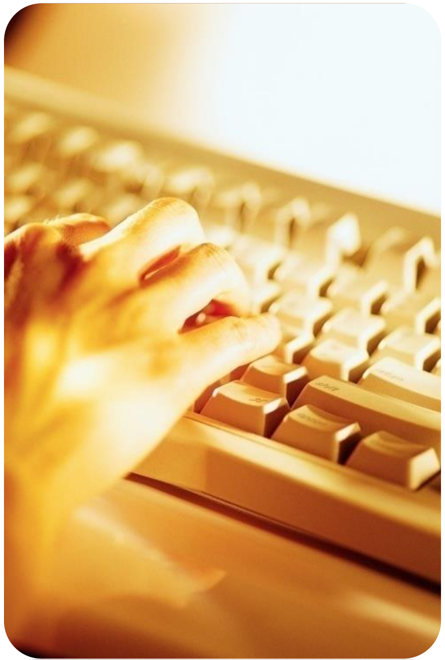
Calculated costs

Period Semi-monthly
Calculation Date 11/03/2008
Employee costs 43.50 USD
☐ Deductions Pre-Tax
Additional Post-Tax 0.00 USD
Employer credit 280.50 USD
☐ Credits Allowed
Provider Cost 324.00 USD
Imp.income 0.00 USD

Individual employee costs

Period Semi-monthly
Alternative Cost Amt USD
Bonus Cost USD

HRMS Activity



Maintain Health Benefits Post-tax

Exercise

Health Care Benefits – Optional Plans

Optional Plans Overview

- Employee's auto/home, optional life and optional long-term disability plans can be viewed in *Miscellaneous Plans* (0377) infotype
- Information is keyed in PAY1 (A.45 and A.46 screens)
- This infotype is updated by an interface (GAP 16)

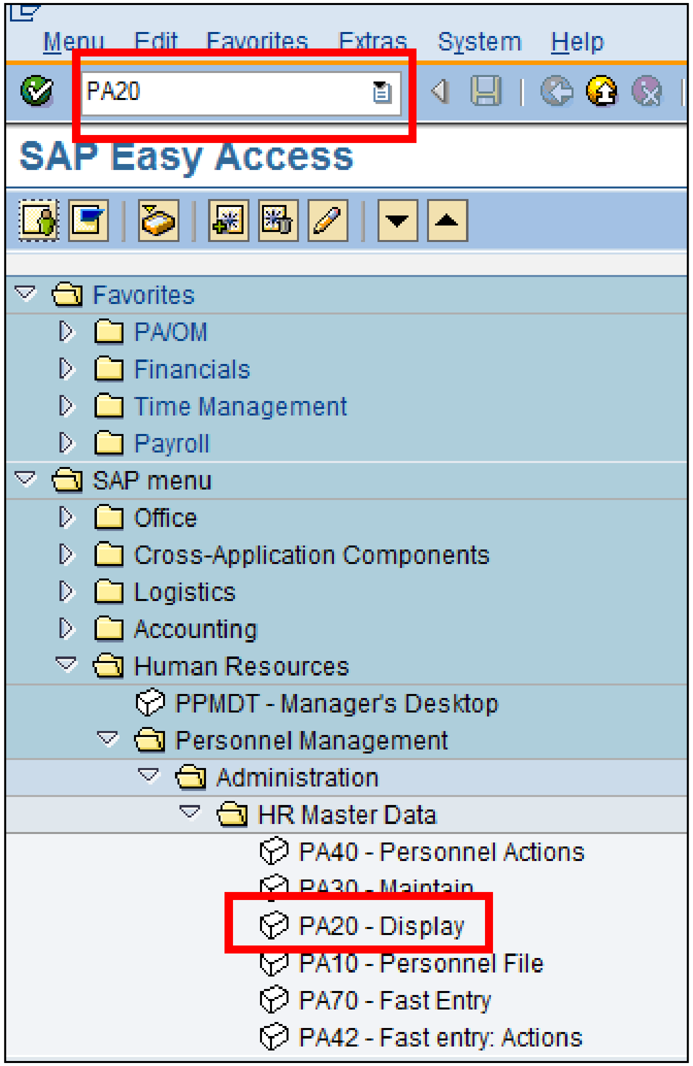
HR
WSD Personnel

Optional Plans - Dates

- Similar to medical and dental plans, the employee has a 31-day choice period.
- Misc. Plans (0377) – LIFE, LTD, LIBM: the period end date determines if a deduction is taken or not. To process a deduction for the 10th, the plan must be active on the last day of the prior month.
- When the employee separates any optional plans will be ended in PAY1 and information will be interfaced into HRMS.
  - Information can be keyed in a month in advance

Display Miscellaneous Plans

- To display Employee information using the menu path:
  - Follow Human Resources → Personnel Management → Administration → HR Master Data → Display
  - Or enter transaction code **PA20** in the **Command** field


Menu
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PA20
SAP Easy Access
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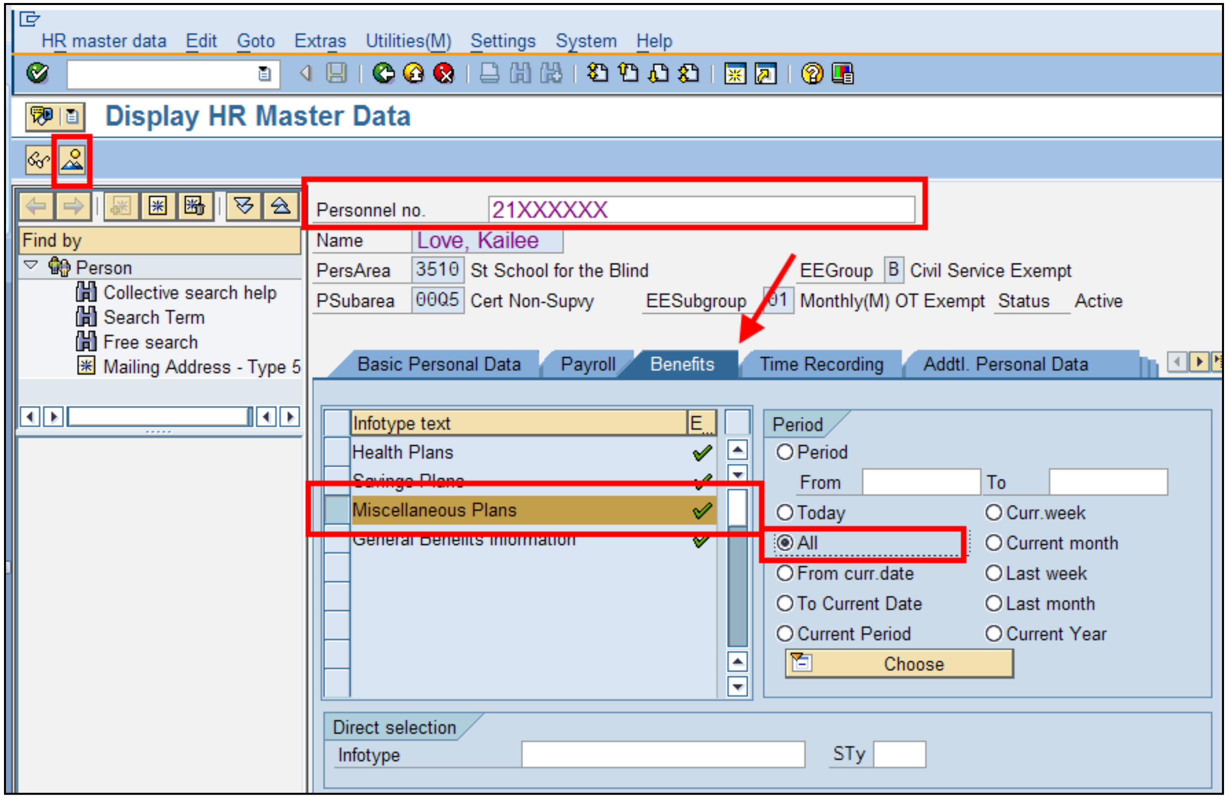
Time Management
Payroll
SAP menu
Office
Cross-Application Components
Logistics
Accounting
Human Resources
PPMDT - Manager's Desktop
Personnel Management
Administration
HR Master Data
PA40 - Personnel Actions
PA30 - Maintain
PA20 - Display
PA10 - Personnel File
PA70 - Fast Entry
PA42 - Fast entry: Actions

Access *Miscellaneous Plans* (0377)

- Enter the Personnel no. and click ✓ **(Enter)** to validate
- Click the **Benefits** tab
- Click the gray box to the left of *Miscellaneous Plans* (0377) to select
- In the period section, click ‘All’
- Click **(Overview)** for an overview of all actions associated with the *Miscellaneous Plans* (0377)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Basic Personal Data
Payroll
Benefits
Time Recording
Addtl. Personal Data
Choose
Direct selection
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Display HR Master Data

Personnel no. 21XXXXXX
Name Love, Kailee
PersArea 3510 St School for the Blind
EEGroup B Civil Service Exempt
PSubarea 0005 Cert Non-Supvy
EESubgroup 01 Monthly(M) OT Exempt
Status Active

Infotype text	E...
Health Plans	✓
Savings Plans	✓
Miscellaneous Plans	✓
General Benefits Information	✓

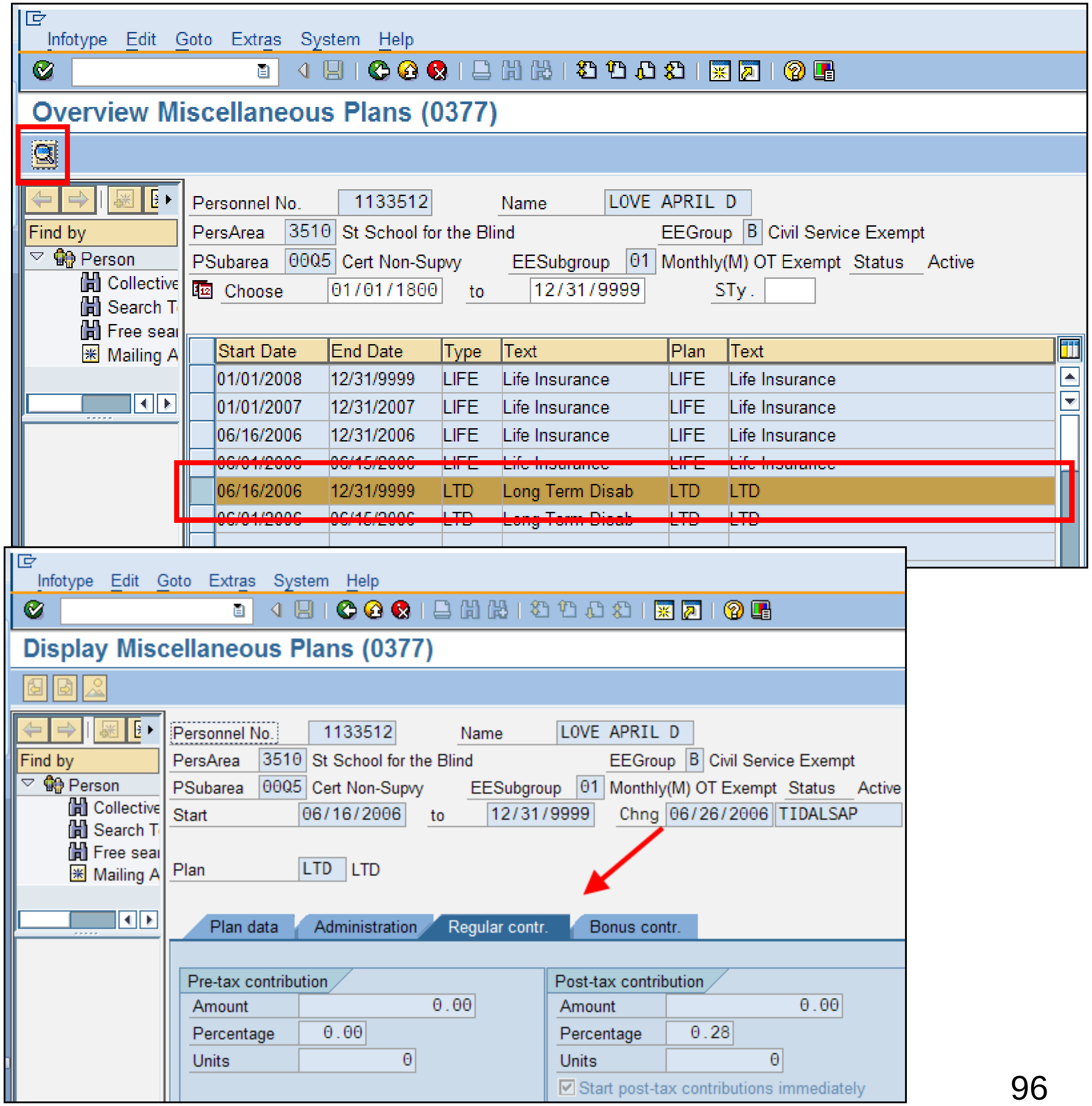
Period
○ Period
From To
○ Today
○ Curr.week
● All
○ Current month
○ From curr.date
○ Last week
○ To Current Date
○ Last month
○ Current Period
○ Current Year

HR
WSD Personnel

Access *Miscellaneous Plans* (0377)

- Click the gray box next to the appropriate record
- Click **(Choose)** to view the selected record

Note: The employee's deduction can be found on the *Regular Contr.* Tab.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Bonus contr.

Overview Miscellaneous Plans (0377)

Personnel No. 1133512 Name LOVE APRIL D
PersArea 3510 St School for the Blind EEGroup B Civil Service Exempt
PSubarea 0005 Cert Non-Supvy EESubgroup 01 Monthly(M) OT Exempt Status Active
Choose 01/01/1800 to 12/31/9999 STy.

Start Date	End Date	Type	Text	Plan	Text
01/01/2008	12/31/9999	LIFE	Life Insurance	LIFE	Life Insurance
01/01/2007	12/31/2007	LIFE	Life Insurance	LIFE	Life Insurance
06/16/2006	12/31/2006	LIFE	Life Insurance	LIFE	Life Insurance
06/01/2006	06/15/2006	LIFE	Life Insurance	LIFE	Life Insurance
06/16/2006	12/31/9999	LTD	Long Term Disab	LTD	LTD
06/01/2006	06/15/2006	LTD	Long Term Disab	LTD	LTD

Display Miscellaneous Plans (0377)

Personnel No. 1133512 Name LOVE APRIL D
PersArea 3510 St School for the Blind EEGroup B Civil Service Exempt
PSubarea 0005 Cert Non-Supvy EESubgroup 01 Monthly(M) OT Exempt Status Active
Start 06/16/2006 to 12/31/9999 Chng 06/26/2006 TIDALSAP
Plan LTD LTD

Pre-tax contribution
Amount 0.00
Percentage 0.00
Units 0

Post-tax contribution
Amount 0.00
Percentage 0.28
Units 0
☑ Start post-tax contributions immediately

HRMS Activity

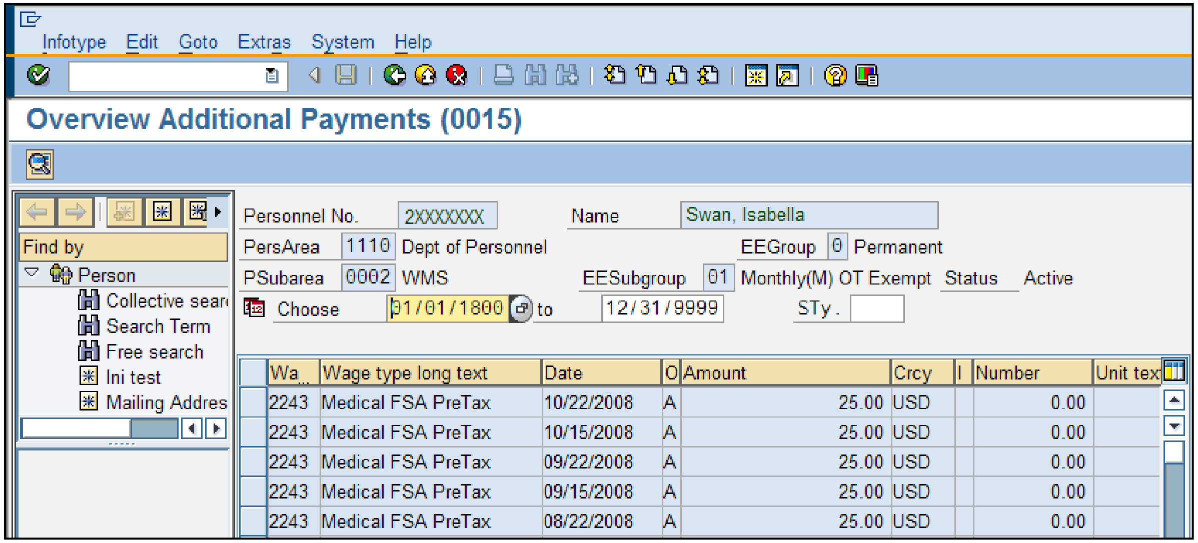
View Miscellaneous Plans

Flexible Spending Account (FSA)

Flexible Spending Account (FSA)

- The Health Care FSA is a reimbursement account that allows all state agency and higher education employees to set aside funds for essential health care expenses that are not covered or partially covered. (Medical, Dental and Vision Plans)
  - This program is offered by the third party vendor Flex Plan.
- Funds are deducted from the employee’s pay check, pre-tax (before Federal & State income taxes and Federal Insurance Contributions Act taxes are deducted) in equal amounts over the course of the plan year.
- When employees incur expenses that are qualified, they will submit claims to request reimbursements.

Flexible Spending Account (FSA) – Other Information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Overview Additional Payments (0015)

Personnel No. 2XXXXXXX Name Swan, Isabella
PersArea 1110 Dept of Personnel EEGroup 0 Permanent
PSubarea 0002 WMS EESubgroup 01 Monthly(M) OT Exempt Status Active
Choose 01/01/1800 to 12/31/9999 STy.

Wa...	Wage type long text	Date	O	Amount	Crcy	I	Number	Unit tex
2243	Medical FSA PreTax	10/22/2008	A	25.00	USD		0.00	
2243	Medical FSA PreTax	10/15/2008	A	25.00	USD		0.00	
2243	Medical FSA PreTax	09/22/2008	A	25.00	USD		0.00	
2243	Medical FSA PreTax	09/15/2008	A	25.00	USD		0.00	
2243	Medical FSA PreTax	08/22/2008	A	25.00	USD		0.00	

- Current employees may enroll during the annual open enrollment period, while new employees must enroll within 31 days of becoming eligible.
- Deductions and adjustments will be handled through GAP16 every pay period on *Additional Payments* (0015) – Wage Type **2243** (Medical FSA Pre-tax) and collected funds will be transferred to Flex Plan through GAP34.

Flexible Spending Account (FSA) – Other Information

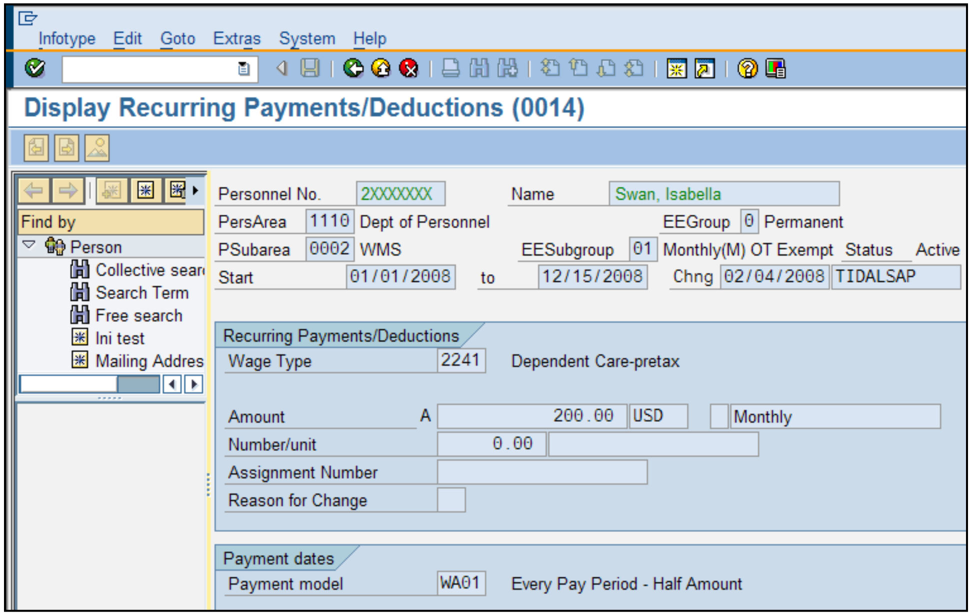
- During the Separation action, the FSA deduction will be delimited any time within the pay period.
- Contact Flex Plan for additional information for assistance at (800) 659-3035.

Dependent Care Assistance Program (DCAP)

Dependent Care Assistance Program (DCAP)

- Washington’s Dependent Care Assistance Program (DCAP) allows state government and higher education employees to set aside pre-tax dollars to pay for out-of-pocket child care expenses.
- Open enrollment occurs every November for the following calendar year (January – December) for existing employees. Once the enrollment process has ended, only new employees may enroll in DCAP within 30 days of employment.
- Employees will complete the appropriate DCAP forms and submit to Flex Plan for approval.
- Contact Flex Plan for additional information or assistance at (800) 669.3539

Dependent Care Assistance Program (DCAP) – Other Information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Display Recurring Payments/Deductions (0014)

Personnel No.	2XXXXXXX	Name	Swan, Isabella
PersArea	1110 Dept of Personnel	EEGroup	0 Permanent
PSubarea	0002 WMS	EESubgroup	01 Monthly(M) OT Exempt; Status: Active
Start	01/01/2008 to 12/15/2008	Chng	02/04/2008 TIDALSAP

Recurring Payments/Deductions

Wage Type	2241	Dependent Care-pretax
Amount	A 200.00 USD	Monthly
Number/unit	0.00	
Assignment Number		
Reason for Change		

Payment dates

Payment model	WA01	Every Pay Period - Half Amount

- Deductions and adjustments will be handled through GAP16 in January each year on *Recurring Payments/Deductions* (0014) – Wage Type **2241** (Dependent Care-pretax) and collected funds will be transferred to Flex Plan through GAP34.
- During the Separation action, the DCAP deduction will be delimited any time within the pay period.

Retirement Benefits

Retirement Benefits Overview

Upon completion of this section, you will be able to:

- Describe the concepts associated with the Retirement process
- Explain the overall business process flow
- Enroll an employee
- Discuss Optional Plans
- Identify key reports

Retirement Enrollment Process

- The Retirement Enrollment Process is completed as a part of the New Hire or Rehire process
- The Benefits Processor will use this process to determine an employee’s eligibility and enrollment into a retirement plan

Check Retirement eligibility of the employee/ position

Create Retirement infotypes

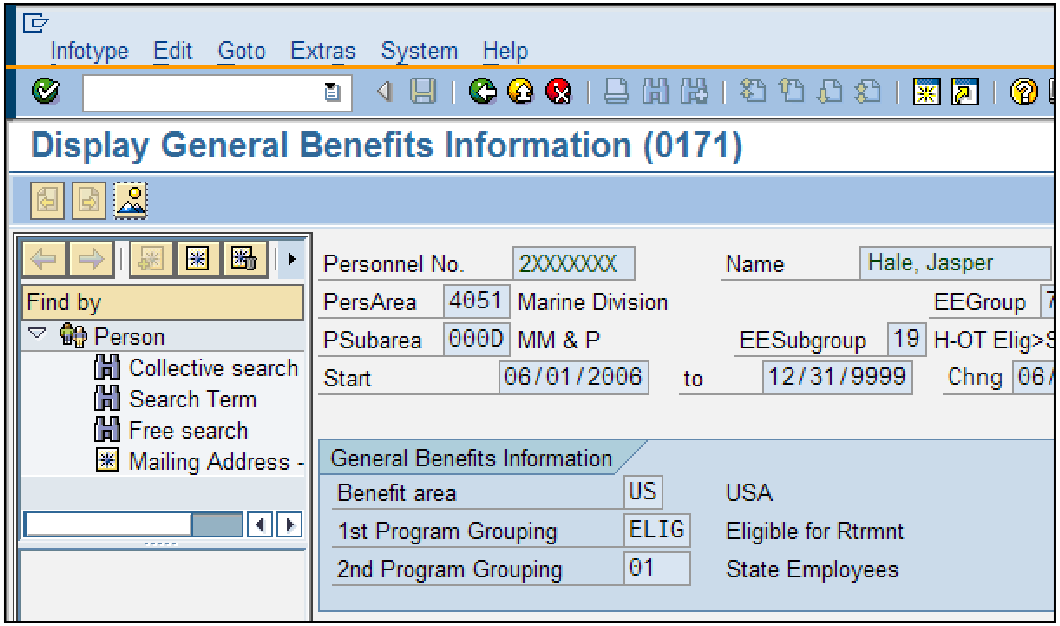
Review employee Retirement Plan enrollment selections

Pull 70 and 90-day reports

Verify information is correct and edit appropriately

Retirement Eligibility

- Retirement plan eligibility is determined when the position is created and is stored in *General Benefits Information* (0171)
  - Information for these fields come from the position and the employee's *Organizational Assignment* (0001)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Display General Benefits Information (0171)

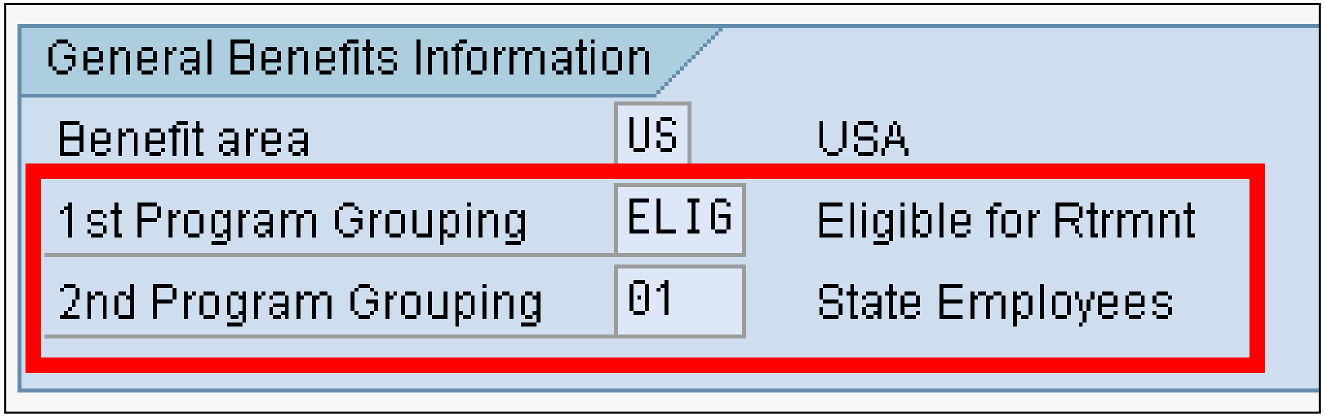
Personnel No. 2XXXXXXX
Name Hale, Jasper
PersArea 4051 Marine Division
EEGroup
PSubarea 000D MM & P
EESubgroup 19 H-OT Elig>
Start 06/01/2006 to 12/31/9999
Chng 06/

General Benefits Information

Benefit area	US	USA
1st Program Grouping	ELIG	Eligible for Rtrmnt
2nd Program Grouping	01	State Employees

Retirement Eligibility – cont'd

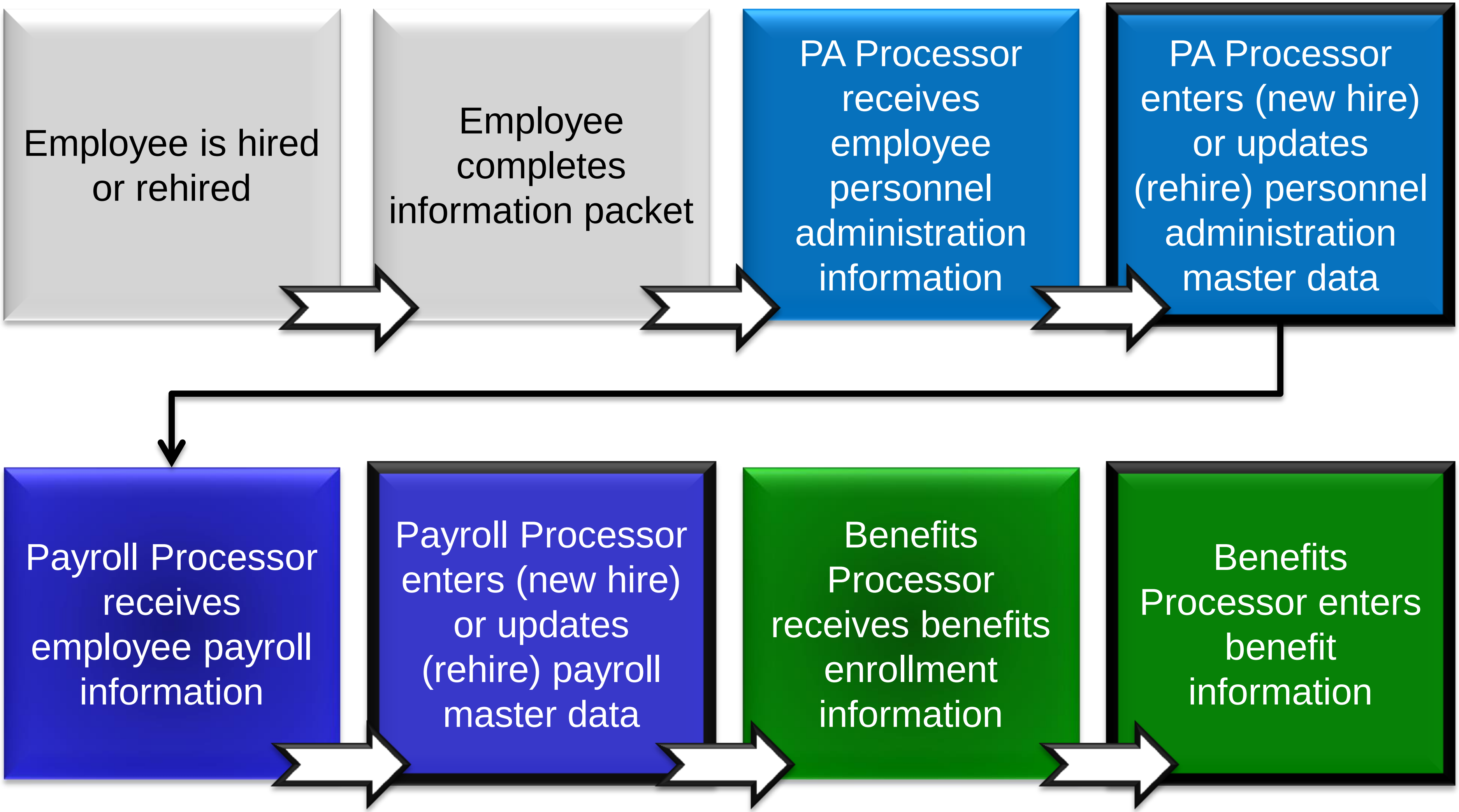
- The **1st Program Grouping** field reflects the position's eligibility
  - Information defaults always defaults in as 'ELIG' and be can overwritten if necessary
- The **2nd Program Grouping** field defines the employee's job type and employer
  - The **2nd Program Grouping** field defaults can be overridden based on a prior retirement system enrollment
  - Ensure 2nd Program Grouping reflects the appropriate retirement employee type code (i.e., state employee (PERS) or teacher (TRS)



General Benefits Information

Benefit area	US	USA
1st Program Grouping	ELIG	Eligible for Rtrmnt
2nd Program Grouping	01	State Employees

New Hire / Rehire Process Flow



Employee is hired or rehired

Employee completes information packet

PA Processor receives employee personnel administration information

PA Processor enters (new hire) or updates (rehire) personnel administration master data

Payroll Processor receives employee payroll information

Payroll Processor enters (new hire) or updates (rehire) payroll master data

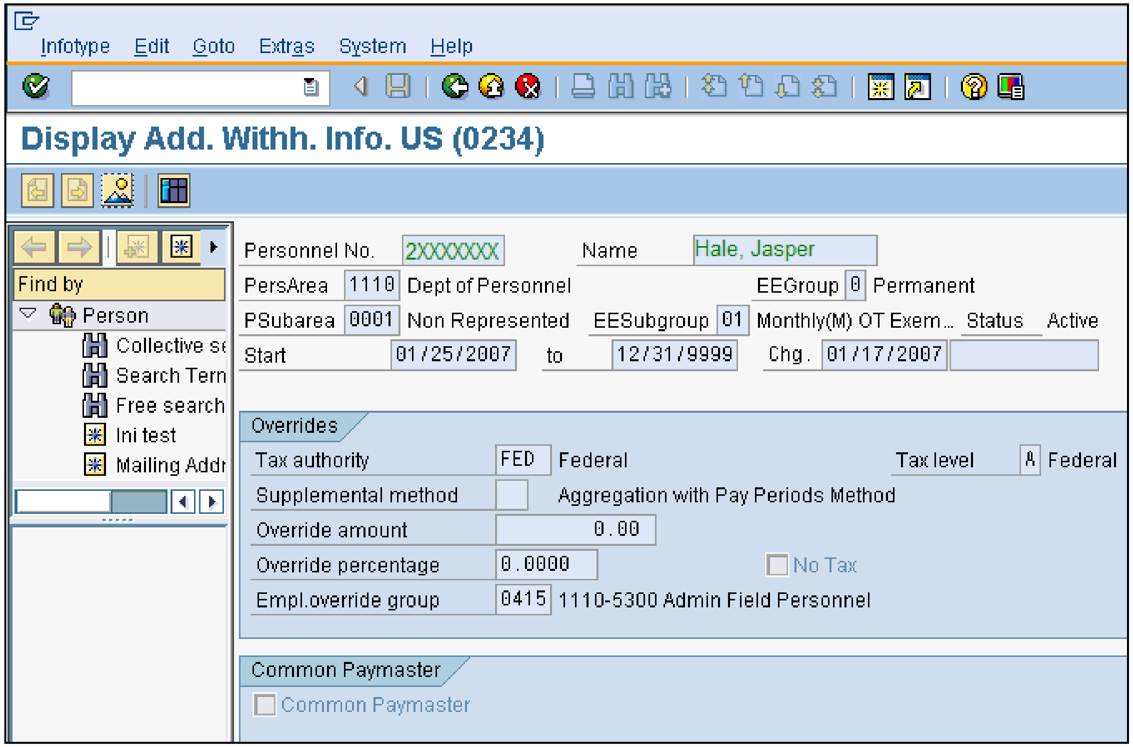
Benefits Processor receives benefits enrollment information

Benefits Processor enters benefit information

Legend: ☐ HRMS Entry 🟦 HR 🟦 Payroll 🟩 Benefits

New Hire or Rehire Action

- During the New Hire and Rehire action, the Personnel Administration Processor begins the Personnel Action transaction **(PA40)** and hands it off to the Payroll Processor who ends the action after saving *Add. Withh. Info. US* (0234)



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Display Add. Withh. Info. US (0234)

Personnel No.	2XXXXXXX		Name	Hale, Jasper	
PersArea	1110	Dept of Personnel	EEGroup	0	Permanent
PSubarea	0001	Non Represented	EESubgroup	01	Monthly(M) OT Exem... Status Active
Start	01/25/2007	to	12/31/9999	Chg.	01/17/2007

Overrides

Tax authority	FED	Federal
Tax level	A	Federal
Supplemental method		Aggregation with Pay Periods Method
Override amount	0.00	
Override percentage	0.0000	☐ No Tax
Empl.override group	0415	1110-5300 Admin Field Personnel

Common Paymaster

☐ Common Paymaster

Benefits Eligibility and Enrollment

- The Payroll Processor makes the handoff to the Benefits Processor to complete the enrollment process
  - The process will continue by accessing the same initial transaction code **PA40**

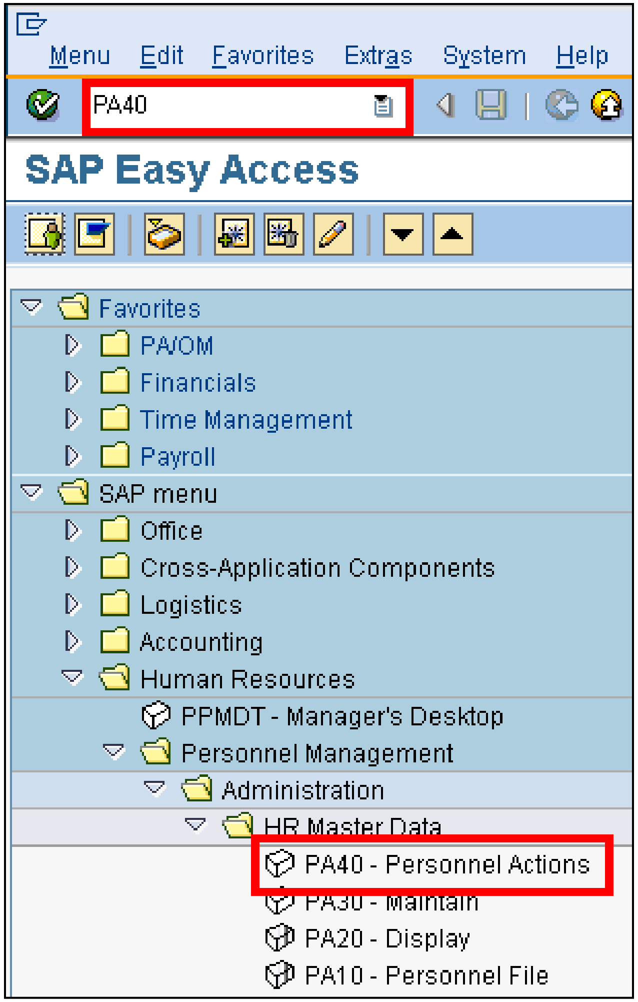
HR
WSD Personnel

Benefits Eligibility and Enrollment

- During the Retirement Enrollment, a new state employee has a 90-day option to select a Retirement Plan (PERS 2, PERS 3, etc.)
- In the Rehire action, agencies should refer to Department of Retirement Systems to determine the employee’s eligibility
- When processing an Appointment Change the employee will need to be re-enrolled into a Retirement Plan depending on their eligibility

Enrolling Employee for Retirement

- To enroll an employee for retirement use the menu path:
  - Follow Human Resources → Personnel Management → Administration → HR Master Data → Personnel Actions
  - Or enter transaction code **PA40** in the **Command** field
- Using the action will ensure that all required infotype records are created and the employee's available retirement plans will display

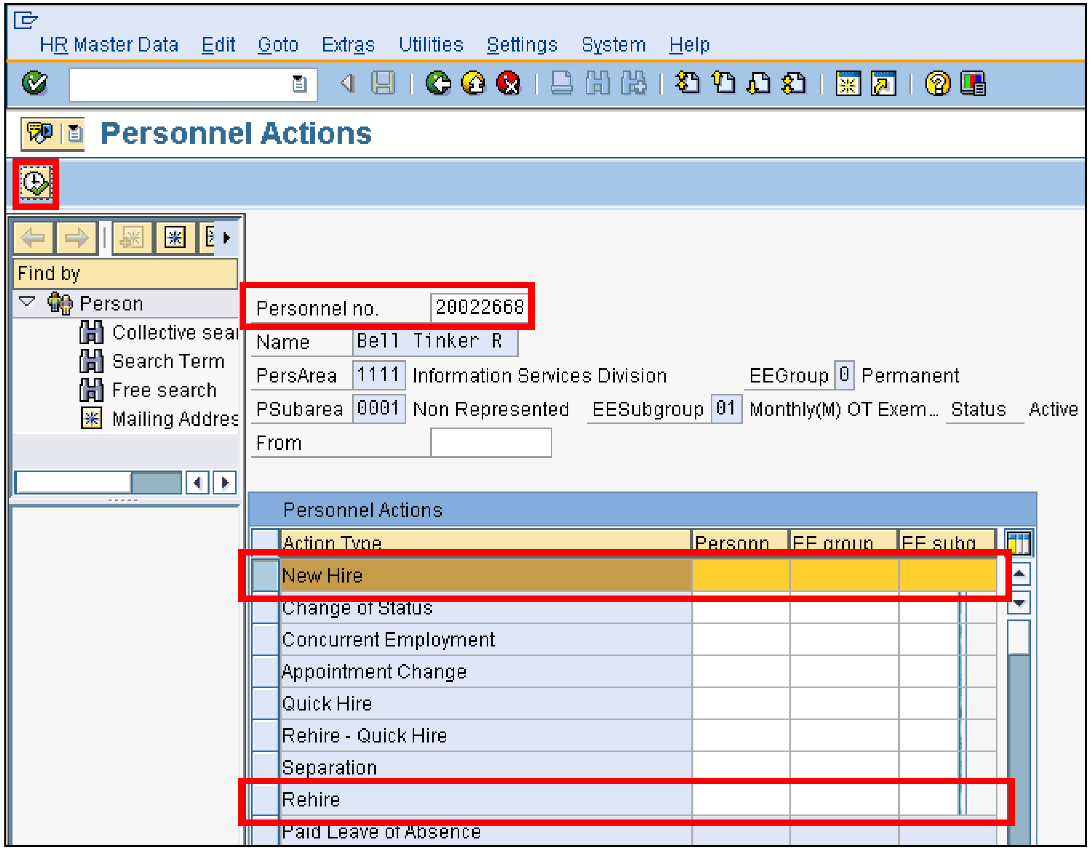


PA40

Menu
Edit
Favorites
Extras
System
Help
SAP Easy Access
Favorites
PA/OM
Financials
Time Management
Payroll
SAP menu
Office
Cross-Application Components
Logistics
Accounting
Human Resources
PPMDT - Manager's Desktop
Personnel Management
Administration
HR Master Data
PA40 - Personnel Actions
PA30 - Maintain
PA20 - Display
PA10 - Personnel File

Accessing the New Hire or Rehire Action

- A personnel number is required to complete the New Hire or Rehire action
- To access the action, click the gray box to the left of **New Hire** or **Rehire** to select
- Click (**Execute**) to execute a process or action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Personnel no. 20022668

Name Bell Tinker R

PersArea 1111 Information Services Division EEGroup 0 Permanent

PSubarea 0001 Non Represented EESubgroup 01 Monthly(M) OT Exem... Status Active

From

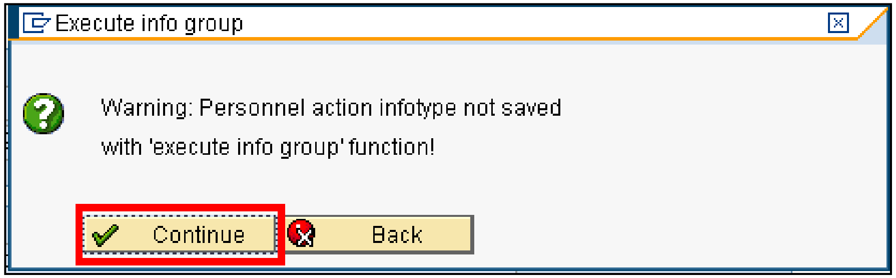
Personnel Actions

Action Type	Personn	EE group	EE subg
New Hire			
Change of Status			
Concurrent Employment			
Appointment Change			
Quick Hire			
Rehire - Quick Hire			
Separation			
Rehire			
Paid Leave of Absence			

Note: Do not enter the *From* date on the Personnel Actions screen.

Retirement Enrollment – New Hire or Rehire

- From *Actions* (0000) click Execute info group **(Execute info group)**
- The following warning message will appear:

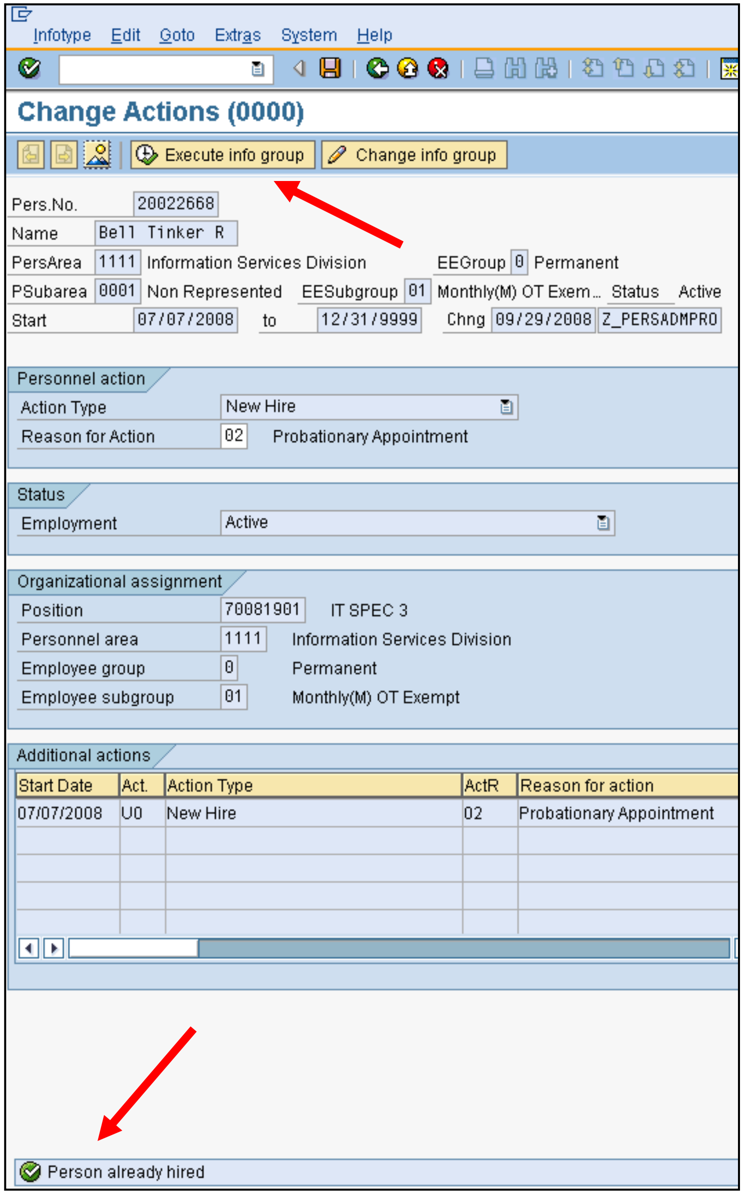


Execute info group

Warning: Personnel action infotype not saved with 'execute info group' function!

- Click Continue **(Continue)**

Note: Notice message on the status bar of 'Person already hired'.



Change Actions (0000)

Pers.No.	20022668				
Name	Bell Tinker R				
PersArea	1111 Information Services Division		EEGroup	0 Permanent	
PSubarea	0001 Non Represented	EESubgroup	01 Monthly(M) OT Exem...	Status	Active
Start	07/07/2008 to 12/31/9999		Chng	09/29/2008	Z_PERSADMPRO

Personnel action

Action Type	New Hire	
Reason for Action	02	Probationary Appointment

Status

Employment: Active

Organizational assignment

Position	70081901	IT SPEC 3
Personnel area	1111	Information Services Division
Employee group	0	Permanent
Employee subgroup	01	Monthly(M) OT Exempt

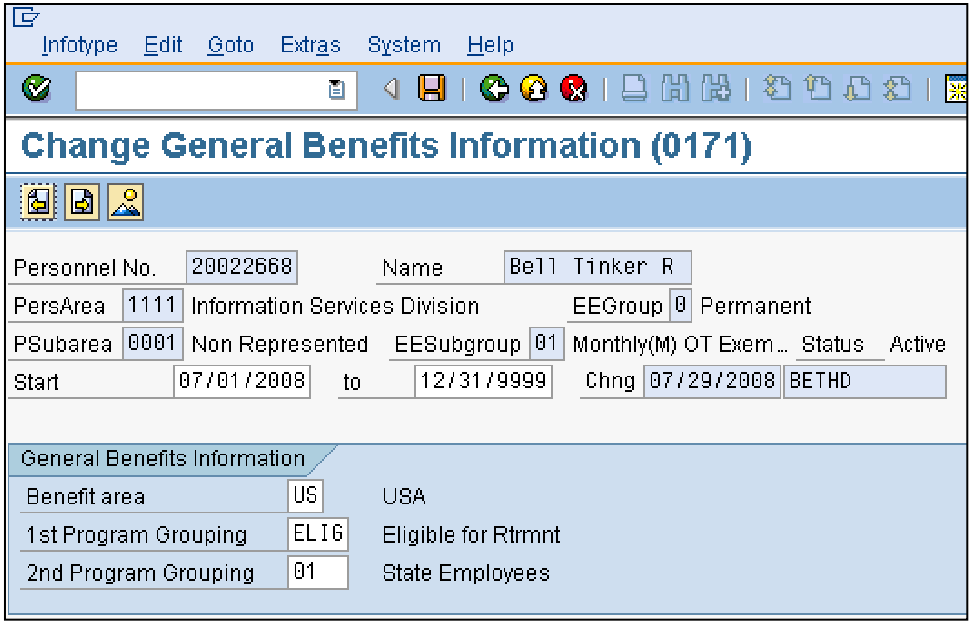
Additional actions

Start Date	Act.	Action Type	ActR	Reason for action
07/07/2008	U0	New Hire	02	Probationary Appointment

Person already hired

Retirement Enrollment – New Hire or Rehire

- As mentioned before, the Personnel Administrator Processor already started the Hire Action and the Payroll Processor has completed the applicable personnel infotypes
- Once the Infotype Group is executed, you will have to click **(Next Record)** to advance to *General Benefits Information* (0171)



Change General Benefits Information (0171)

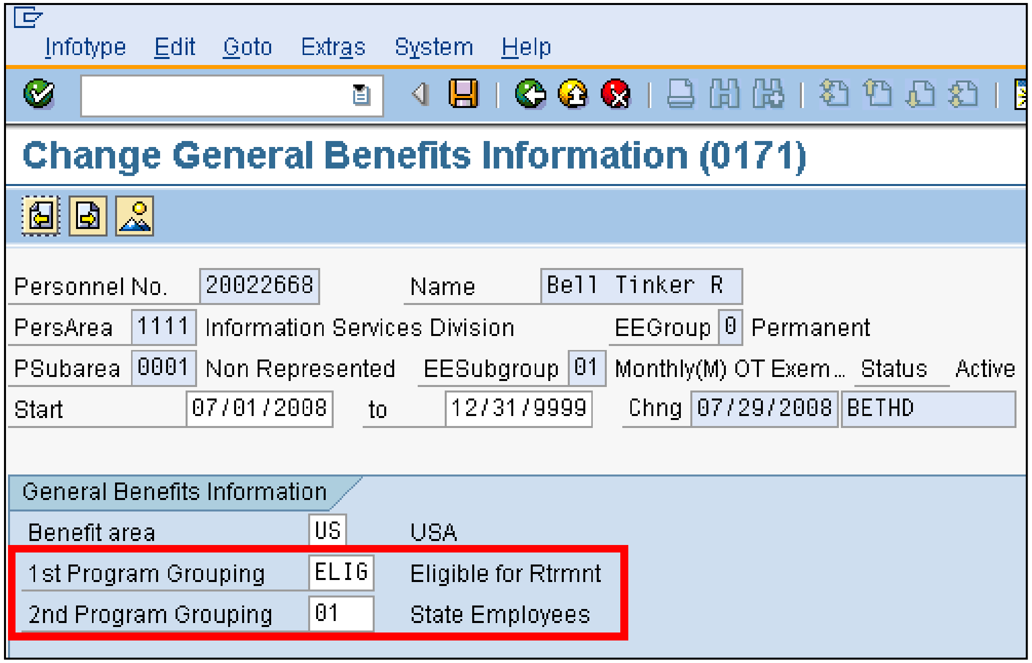
Personnel No. 20022668 Name Bell Tinker R
PersArea 1111 Information Services Division EEGroup 0 Permanent
PSubarea 0001 Non Represented EESubgroup 01 Monthly(M) OT Exem... Status Active
Start 07/01/2008 to 12/31/9999 Chng 07/29/2008 BETHD

General Benefits Information

Benefit area	US	USA
1st Program Grouping	ELIG	Eligible for Rtrmnt
2nd Program Grouping	01	State Employees

General Benefits Information (0171)

- The *General Benefits Information* infotype records the position’s retirement eligibility
- Optional fields to complete:
  - **1st Program Grouping**
  - **2nd Program Grouping**
- When finished, click ✓ (**Enter**) and then click 💾 (**Save**)



Change General Benefits Information (0171)

Personnel No. 20022668 Name Bell Tinker R

PersArea 1111 Information Services Division EEGroup 0 Permanent

PSubarea 0001 Non Represented EESubgroup 01 Monthly(M) OT Exem... Status Active

Start 07/01/2008 to 12/31/9999 Chng 07/29/2008 BETHD

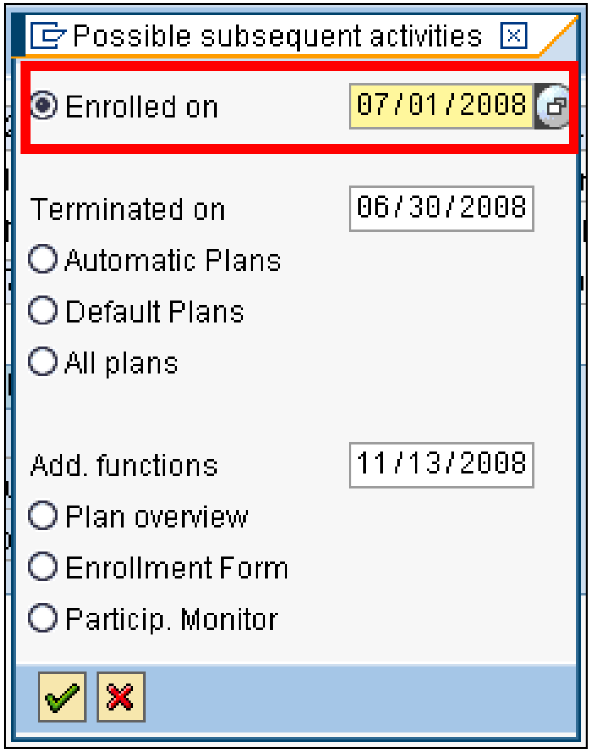
General Benefits Information

Benefit area	US	USA
1st Program Grouping	ELIG	Eligible for Rtrmnt
2nd Program Grouping	01	State Employees

Note: If the position is ineligible for retirement, the infotype should be saved for all other benefits to process correctly in payroll.

Retirement Enrollment

- The Possible subsequent activities window will appear with the Enrolled on date selected **(This date should be the same as the original hire date.)**
- Click ✓ **(Continue (Enter))** to continue
- **If the employee is not eligible for retirement AND is not a retiree returning to work,** click ☒ **(Close)** to close the window and return to the Personnel Actions screen



Possible subsequent activities

● Enrolled on 07/01/2008

Terminated on 06/30/2008

○ Automatic Plans

○ Default Plans

○ All plans

Add. functions 11/13/2008

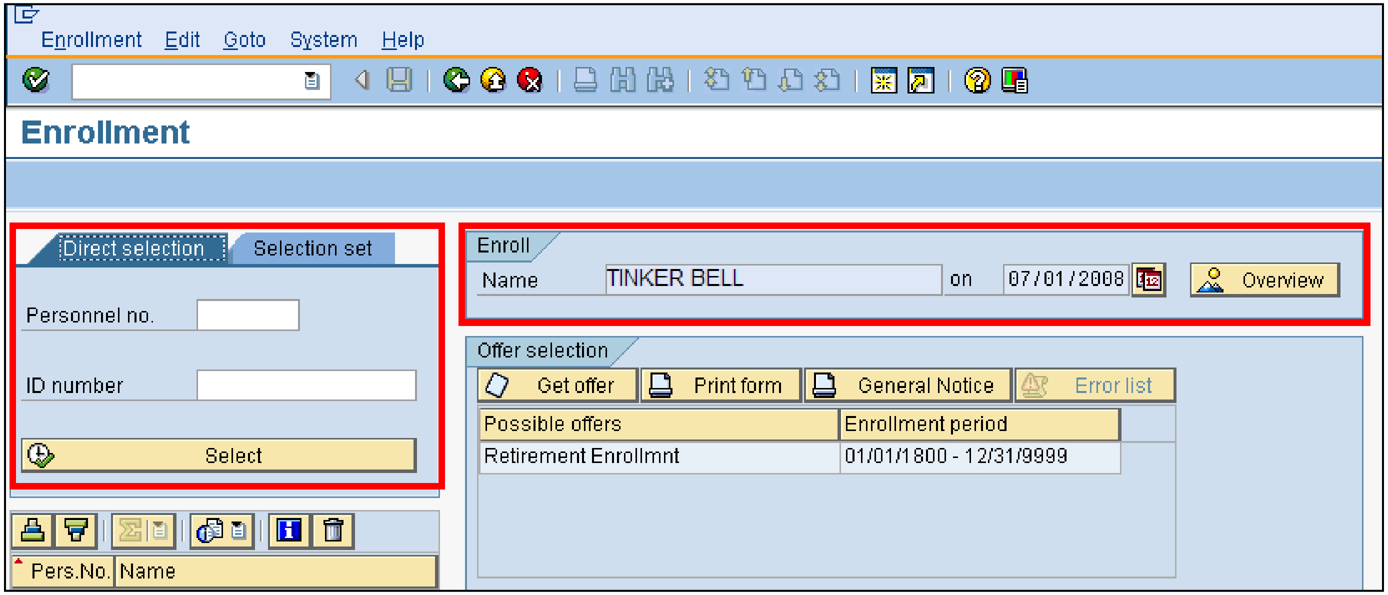
○ Plan overview

○ Enrollment Form

○ Particip. Monitor

Enrollment

- The Enrollment screen is used to view and enroll the employee into their eligible retirement plan
- Verify the employee's name in the Enroll section (Employee's name can be searched using the Direct Selection option on the left)
- Once verified, click Get offer **(Get offer)**


Enrollment
Edit
Goto
System
Help
Enrollment
Direct selection
Selection set
Personnel no.
ID number
Select
Pers.No.
Name
Enroll
Overview
Offer selection
Get offer
Print form
General Notice
Error list

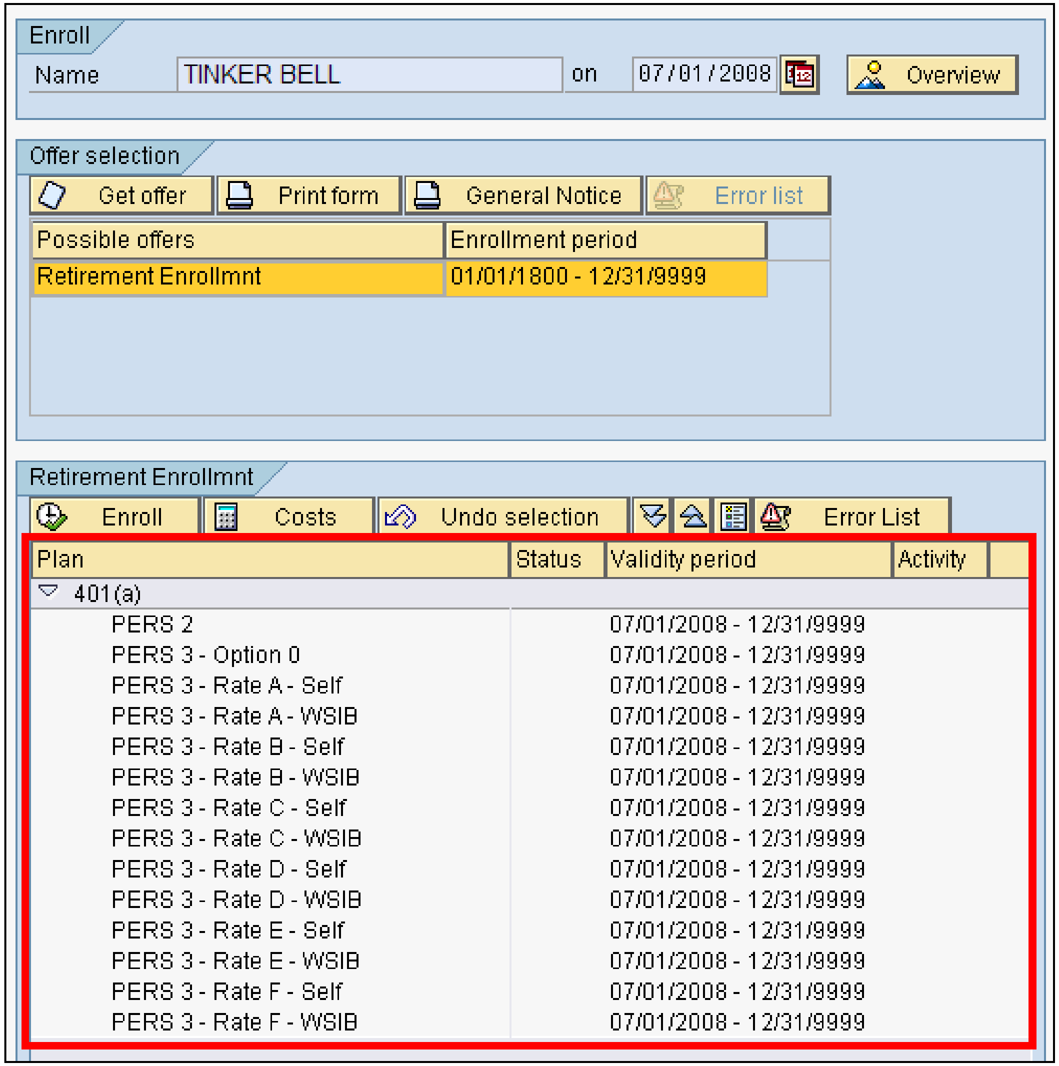
Name TINKER BELL on 07/01/2008

Possible offers	Enrollment period
Retirement Enrollmnt	01/01/1800 - 12/31/9999

HR
WSD **Personnel**

Enrollment

- Only the retirement plans that the employee is eligible for will appear under the *Retirement Enrollmnt* section
- Click on the appropriate plan


Enroll
Overview
Offer selection
Get offer
Print form
General Notice
Error list
Retirement Enrollmnt
Enroll
Costs
Undo selection
Error List

Name TINKER BELL on 07/01/2008

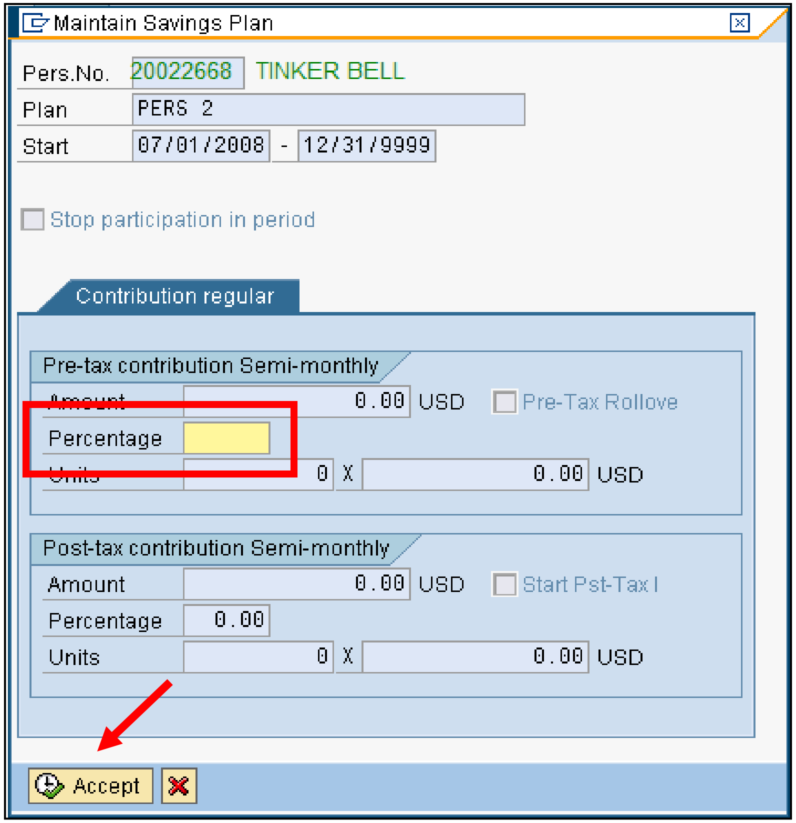
Possible offers	Enrollment period
Retirement Enrollmnt	01/01/1800 - 12/31/9999

Plan	Status	Validity period	Activity
▽ 401(a)			
PERS 2		07/01/2008 - 12/31/9999	
PERS 3 - Option 0		07/01/2008 - 12/31/9999	
PERS 3 - Rate A - Self		07/01/2008 - 12/31/9999	
PERS 3 - Rate A - WSIB		07/01/2008 - 12/31/9999	
PERS 3 - Rate B - Self		07/01/2008 - 12/31/9999	
PERS 3 - Rate B - WSIB		07/01/2008 - 12/31/9999	
PERS 3 - Rate C - Self		07/01/2008 - 12/31/9999	
PERS 3 - Rate C - WSIB		07/01/2008 - 12/31/9999	
PERS 3 - Rate D - Self		07/01/2008 - 12/31/9999	
PERS 3 - Rate D - WSIB		07/01/2008 - 12/31/9999	
PERS 3 - Rate E - Self		07/01/2008 - 12/31/9999	
PERS 3 - Rate E - WSIB		07/01/2008 - 12/31/9999	
PERS 3 - Rate F - Self		07/01/2008 - 12/31/9999	
PERS 3 - Rate F - WSIB		07/01/2008 - 12/31/9999	

Percentage Rate

- The Maintain Savings Plan window will appear, enter the plan's rate in the **Percentage** field under the Pre-tax contribution Semi-monthly section
- When finished, click Accept (**Accept**)

Hint: If you are unsure of the correct percentage rate, enter a random number and the system will generate a message with the correct rate!

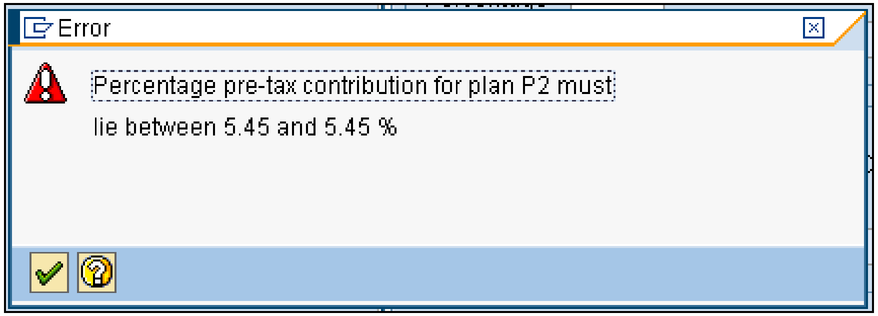


Pers.No. 20022668 TINKER BELL
Plan PERS 2
Start 07/01/2008 - 12/31/9999

☐ Stop participation in period

Pre-tax contribution Semi-monthly
Amount 0.00 USD ☐ Pre-Tax Rollove
Percentage
Units 0 X 0.00 USD

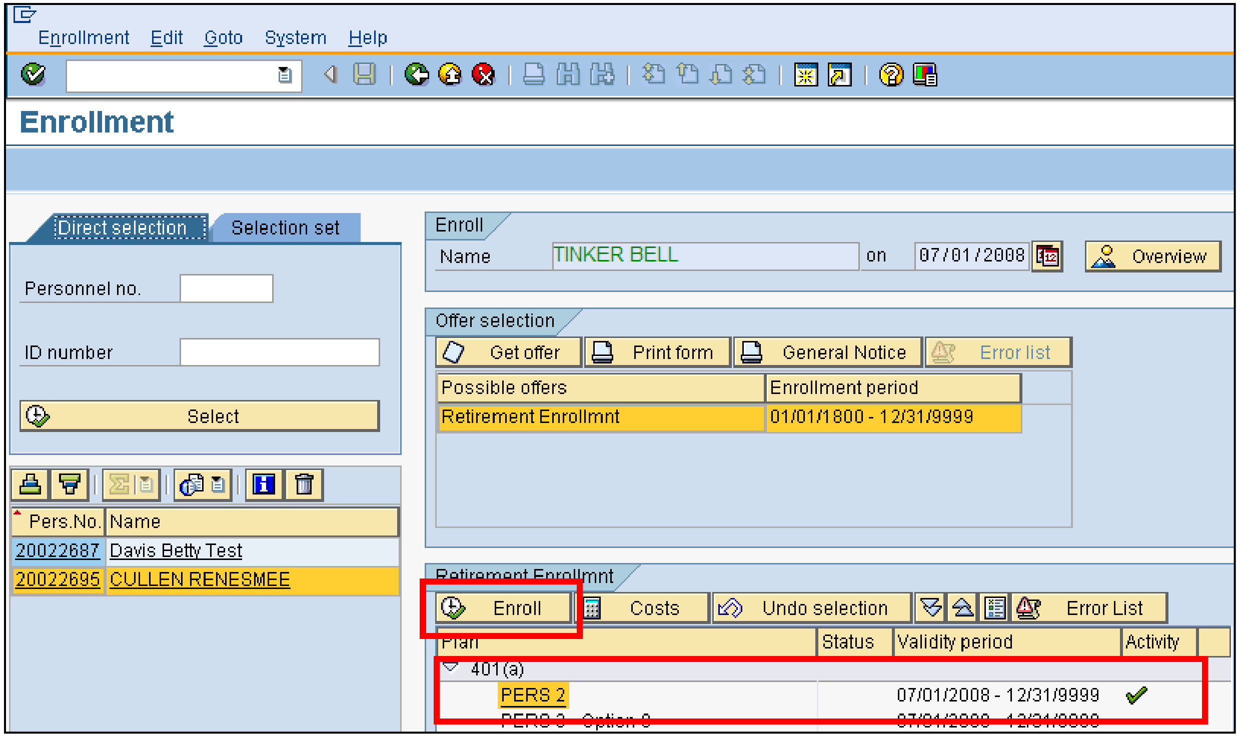
Post-tax contribution Semi-monthly
Amount 0.00 USD ☐ Start Pst-Tax I
Percentage 0.00
Units 0 X 0.00 USD



Percentage pre-tax contribution for plan P2 must lie between 5.45 and 5.45 %

Enrollment

- Once the percentage rate has been entered, you will be taken back to the Enrollment screen where the selected plan is indicated by a green check
- Click Enroll (**Enroll**)


Enrollment
Edit
Goto
System
Help
Enrollment
Direct selection
Selection set
Select
Enroll
Overview
Offer selection
Get offer
Print form
General Notice
Error list
Retirement Enrollmnt
Enroll
Costs
Undo selection
Error List

Personnel no.

ID number

Pers.No.	Name
20022687	Davis Betty Test
20022695	CULLEN RENESMEE

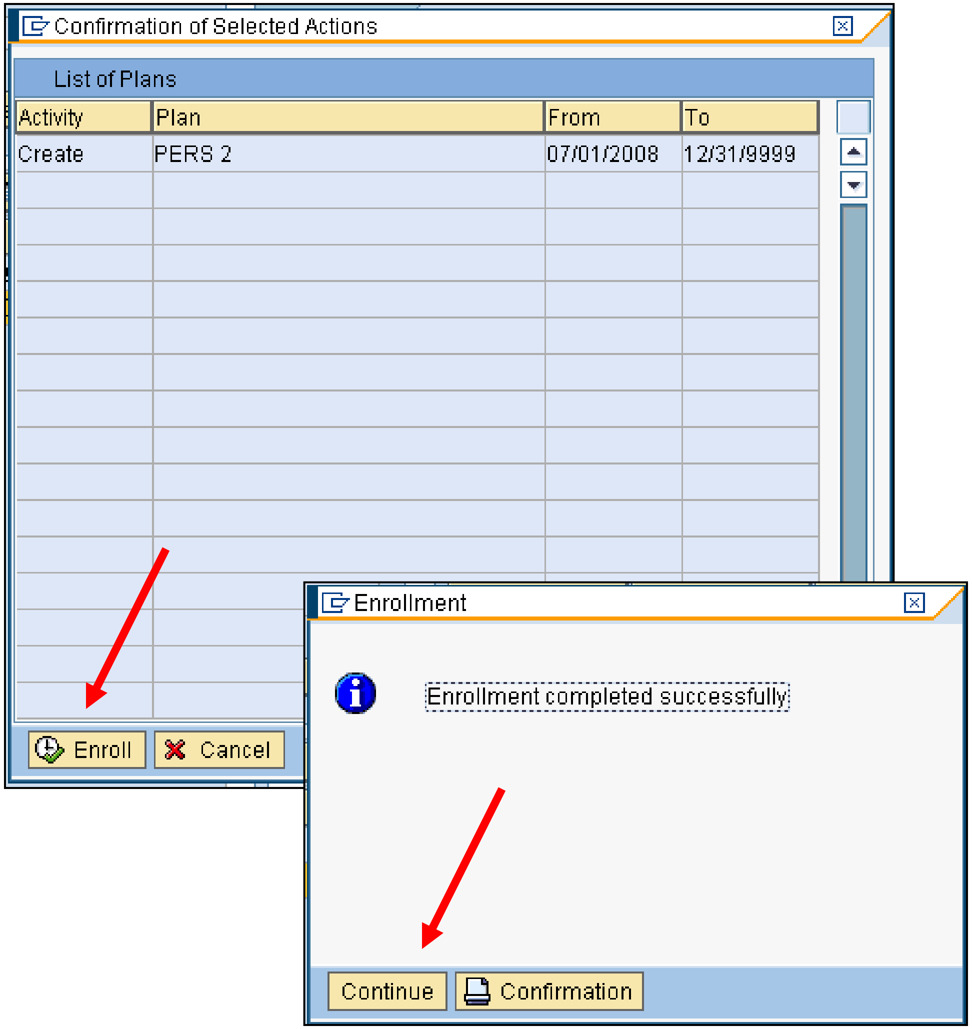
Name TINKER BELL on 07/01/2008

Possible offers	Enrollment period
Retirement Enrollmnt	01/01/1800 - 12/31/9999

Plan	Status	Validity period	Activity
401(a)			
PERS 2		07/01/2008 - 12/31/9999	✓
PERS 3 - Option 3		07/01/2008 - 12/31/9999	

Confirmation of Enrollment

- The Confirmation of Selected Actions window appears with the selected retirement plan
- Click Enroll **(Enroll)**
- The Enrollment window will appear, click Continue **(Continue)** to confirm the completion of enrollment and to return to the Enrollment screen



Confirmation of Selected Actions

List of Plans

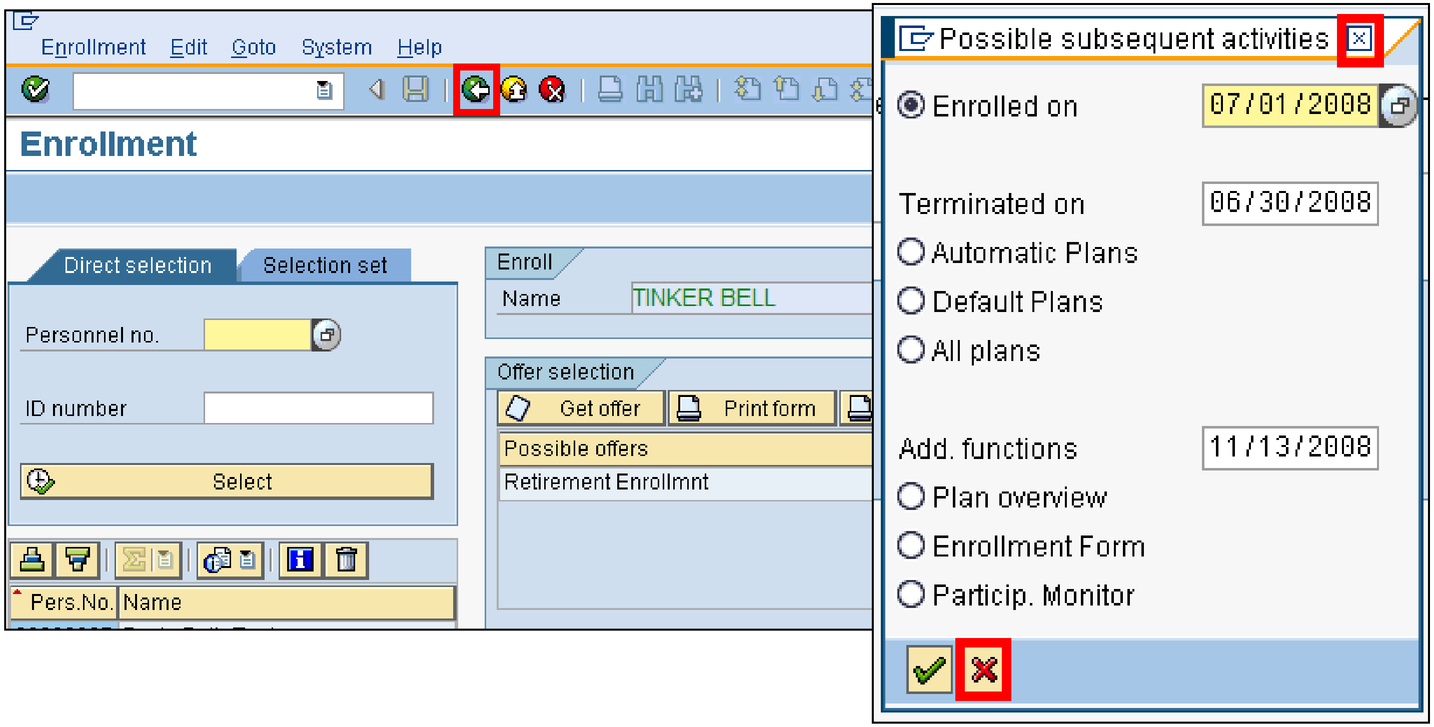
Activity	Plan	From	To
Create	PERS 2	07/01/2008	12/31/9999

Enrollment

Enrollment completed successfully

Enrollment

- Once the enrollment process has been completed, click (**Back**) to return *General Benefits Information* (0171)
- Click ✕ (**Close**) on the Possible subsequent activities window to return to the Personnel Action screen



Enrollment Edit Goto System Help
Enrollment
Direct selection
Selection set
Personnel no.
ID number
Select
Pers.No.
Name
Enroll
Offer selection
Get offer
Print form
Possible offers
Possible subsequent activities

Name TINKER BELL

Retirement Enrollmnt

● Enrolled on 07/01/2008

Terminated on 06/30/2008

○ Automatic Plans

○ Default Plans

○ All plans

Add. functions 11/13/2008

○ Plan overview

○ Enrollment Form

○ Particip. Monitor

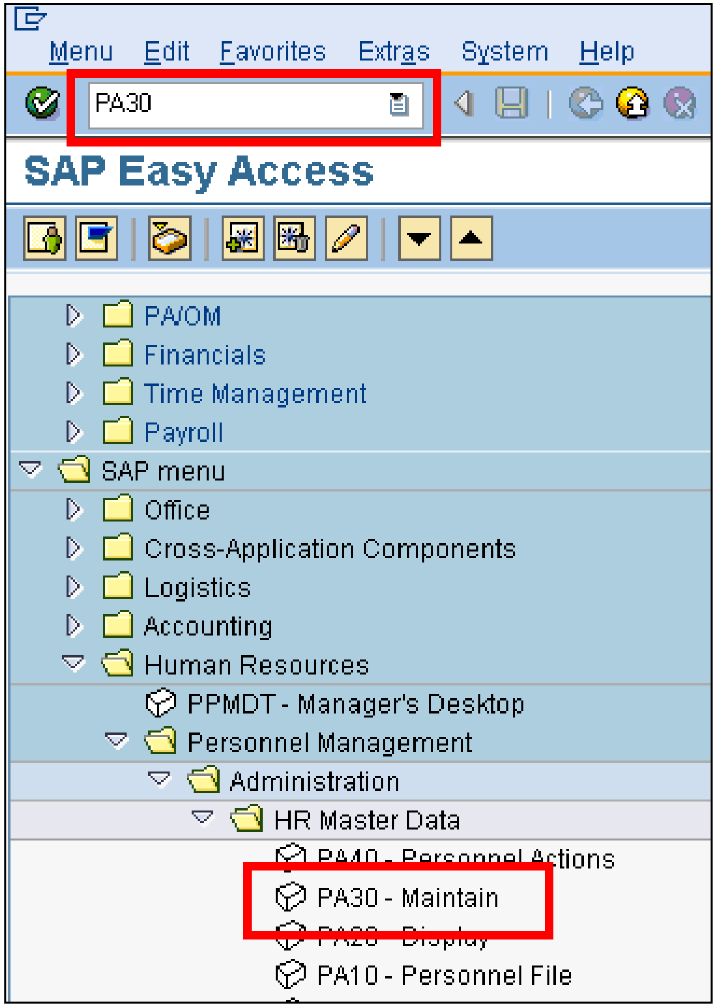
90-day “Choice” Period

- If the employee has not chosen a Plan, the plan choice code will be 2N and the 90-day choice period will begin
- If the employee chooses to stay in Plan 2, the plan choice code will be 2C
- If the employee chooses Plan 3, the plan choice code will be 3C

Note: If no plan is chosen during the 90-day period, the system will default to Plan 3 – Rate A – SELF.

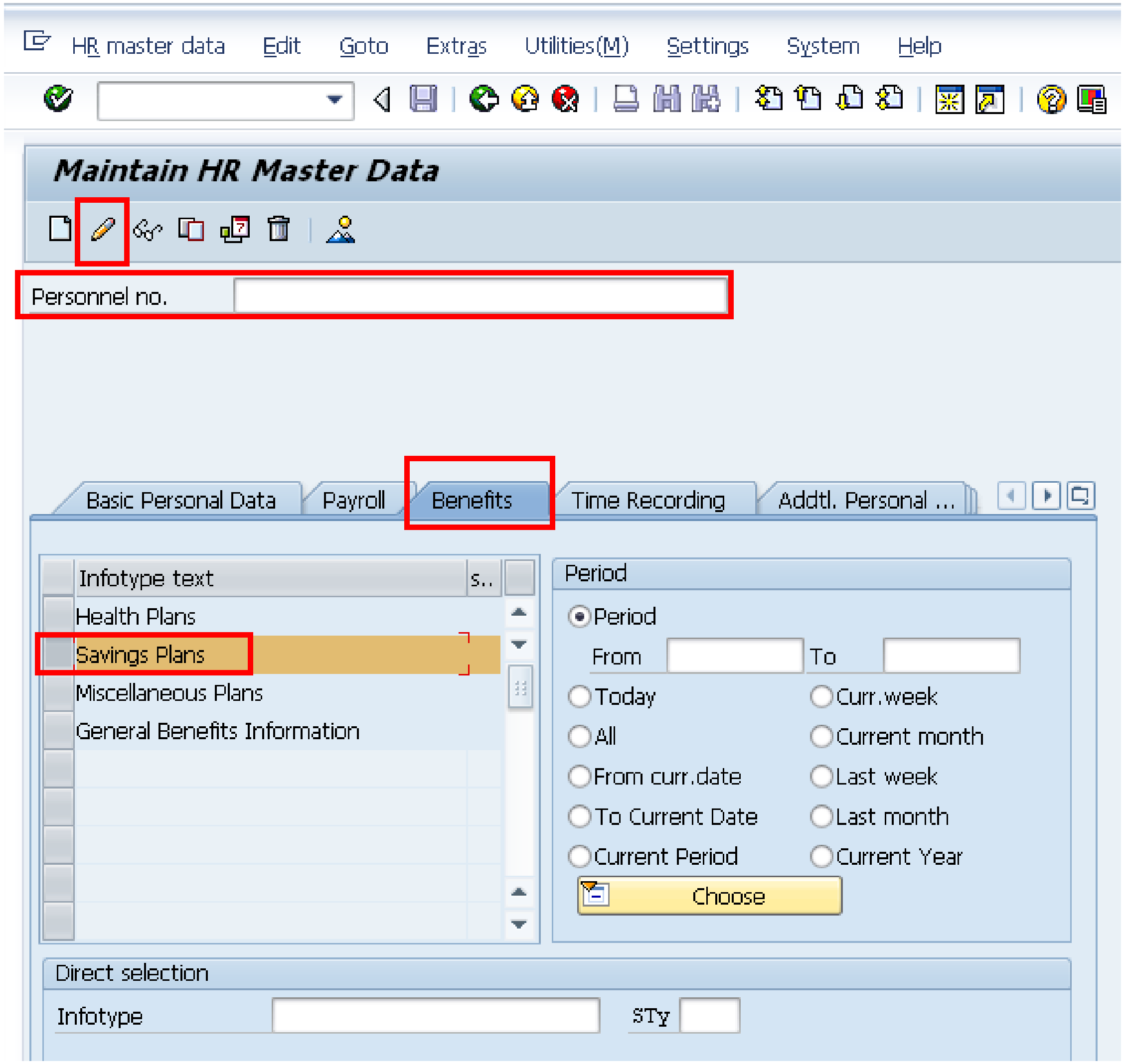
Maintain 90-day Choice Period

- To maintain Retirement Plan Choice during the 90-day period use the menu path:
  - Follow Human Resources → Personnel Management → Administration → HR Master Data → Maintain
  - Or enter transaction code **PA30** in the **Command** field


Menu
Edit
Favorites
Extras
System
Help
PA30
SAP Easy Access
PA/OM
Financials
Time Management
Payroll
SAP menu
Office
Cross-Application Components
Logistics
Accounting
Human Resources
PPMDT - Manager's Desktop
Personnel Management
Administration
HR Master Data
PA40 - Personnel Actions
PA30 - Maintain
PA20 - Display
PA10 - Personnel File

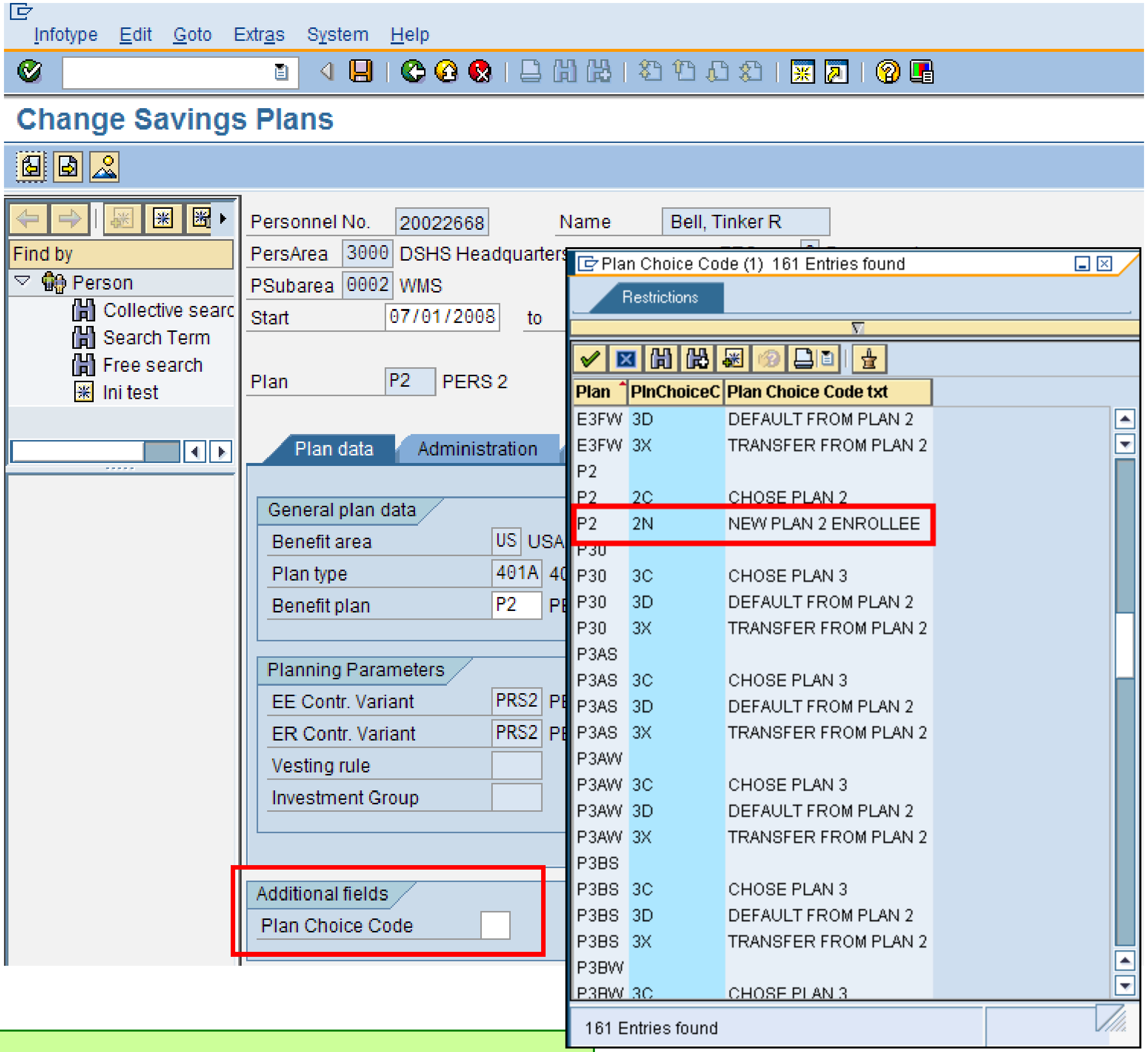
Maintain Savings Plans (0169)

- Enter the employee's Personnel no. and click ✓ **(Enter)** to validate
- Click the **Benefits** tab and click the gray box to the left of *Savings Plan* (0169)
- Click ✎ **(Change)** to change the record


HR master data
Edit
Goto
Extras
Utilities(M)
Settings
System
Help
Maintain HR Master Data
Personnel no.
Basic Personal Data
Payroll
Benefits
Time Recording
Addtl. Personal ...
Infotype text
S..
Health Plans
Savings Plans
Miscellaneous Plans
General Benefits Information
Period
● Period
From
To
○ Today
○ Curr.week
○ All
○ Current month
○ From curr.date
○ Last week
○ To Current Date
○ Last month
○ Current Period
○ Current Year
Choose
Direct selection
Infotype
STy

Maintain Savings Plans (0169)

- In the **Plan Choice Code** field, click the ⧉ **(Matchcode)** to open the selection list
  - Select the plan 2N
  - Click ✓ **(Copy)** to accept
- Click ✓ **(Enter)** to validate and click 💾 **(Save)** to save



Infotype
Edit
Goto
Extras
System
Help
Find by
Person
Collective searc
Search Term
Free search
Ini test
Plan data
Administration
General plan data
Planning Parameters
Additional fields
Restrictions

Change Savings Plans

Personnel No. 20022668
Name Bell, Tinker R
PersArea 3000 DSHS Headquarters
PSubarea 0002 WMS
Start 07/01/2008 to
Plan P2 PERS 2

Benefit area US USA
Plan type 401A 40
Benefit plan P2 PE

EE Contr. Variant PRS2 PE
ER Contr. Variant PRS2 PE
Vesting rule
Investment Group

Plan Choice Code

Plan Choice Code (1) 161 Entries found

Plan	PlnChoiceC	Plan Choice Code txt
E3FW	3D	DEFAULT FROM PLAN 2
E3FW	3X	TRANSFER FROM PLAN 2
P2		
P2	2C	CHOSE PLAN 2
P2	2N	NEW PLAN 2 ENROLLEE
P30		
P30	3C	CHOSE PLAN 3
P30	3D	DEFAULT FROM PLAN 2
P30	3X	TRANSFER FROM PLAN 2
P3AS		
P3AS	3C	CHOSE PLAN 3
P3AS	3D	DEFAULT FROM PLAN 2
P3AS	3X	TRANSFER FROM PLAN 2
P3AW		
P3AW	3C	CHOSE PLAN 3
P3AW	3D	DEFAULT FROM PLAN 2
P3AW	3X	TRANSFER FROM PLAN 2
P3BS		
P3BS	3C	CHOSE PLAN 3
P3BS	3D	DEFAULT FROM PLAN 2
P3BS	3X	TRANSFER FROM PLAN 2
P3BW		
P3BW	3C	CHOSE PLAN 3

161 Entries found

See OLQR User Procedure, [Retirement Plan Choice Code during 90-day period]()

Retirement – Maintain Plan

- Once the employee has made their selection during the 90-day choice period, the Plan Choice Code must be manually entered
- Plan Choice Codes are maintained in *Savings Plan* (0169)
- The following OLQR User Procedures are available:
  - Retirement Plan Choice Code Chosen Plan or Defaulted to Plan 3
  - Retirement Plan Choice Code Chosen Plan or Defaulted to Plan 2

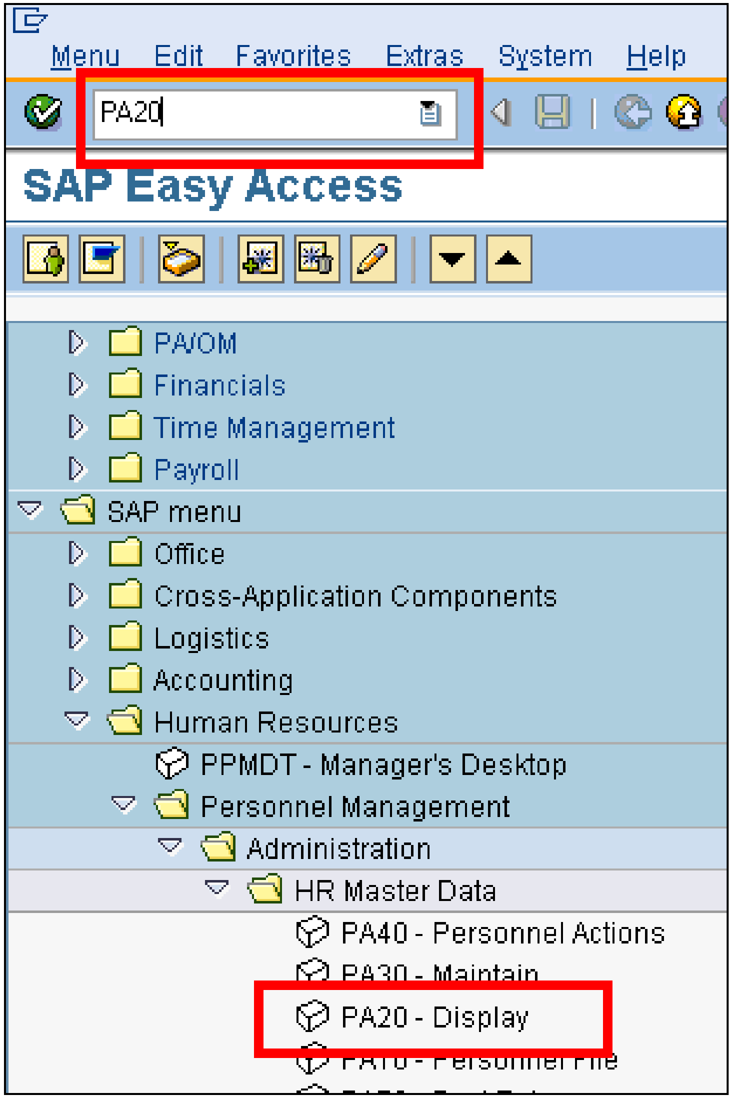
HRMS Activity

Complete the New Hire (Retirement)

View Retirement Benefits

Display HR Master Data

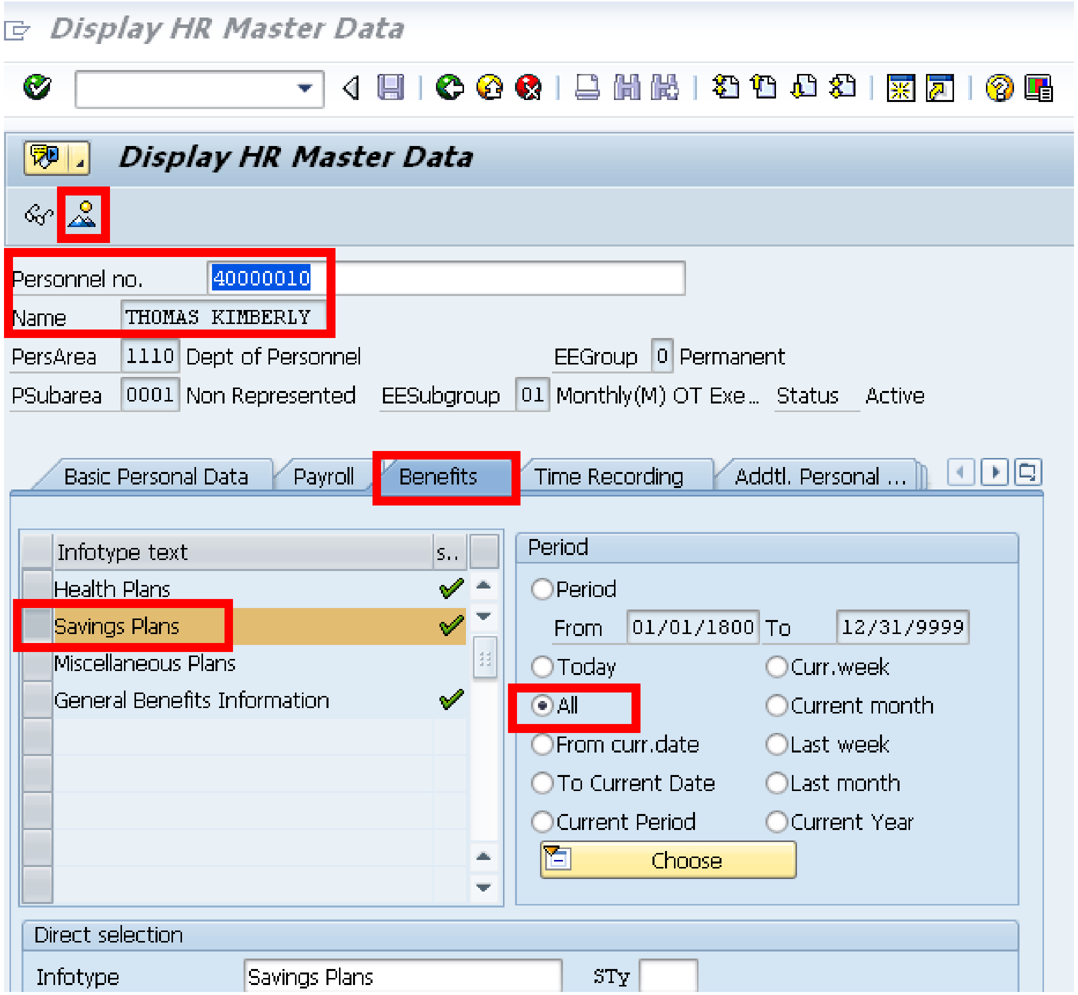
- To display Employee Retirement information using the menu path:
  - Follow Human Resources → Personnel Management → Administration → HR Master Data → Display
  - Or enter transaction code **PA20** in the **Command** field



Menu
Edit
Favorites
Extras
System
Help
PA20
SAP Easy Access
PA/OM
Financials
Time Management
Payroll
SAP menu
Office
Cross-Application Components
Logistics
Accounting
Human Resources
PPMDT - Manager's Desktop
Personnel Management
Administration
HR Master Data
PA40 - Personnel Actions
PA30 - Maintain
PA20 - Display
PA10 - Personnel File

View *Savings Plans* (0169)

- Enter the Personnel No. and click ✓ **(Enter)** to validate
- Select the **Benefits** tab
- Click the gray box to the left *Savings Plan* (0169) to select
- In the Period section, click ‘All’
- Then click **(Overview)** for any overview of all actions associated with the *Savings Plans* (0169)


Display HR Master Data
Display HR Master Data
Basic Personal Data
Payroll
Benefits
Time Recording
Addtl. Personal ...
Choose

Personnel no. 40000010

Name THOMAS KIMBERLY

PersArea 1110 Dept of Personnel

EEGroup 0 Permanent

PSubarea 0001 Non Represented

EESubgroup 01 Monthly(M) OT Exe...

Status Active

Infotype text	S..
Health Plans	✓
Savings Plans	✓
Miscellaneous Plans	
General Benefits Information	✓

Period

○ Period

From 01/01/1800 To 12/31/9999

○ Today
○ Curr.week
● All
○ Current month
○ From curr.date
○ Last week
○ To Current Date
○ Last month
○ Current Period
○ Current Year

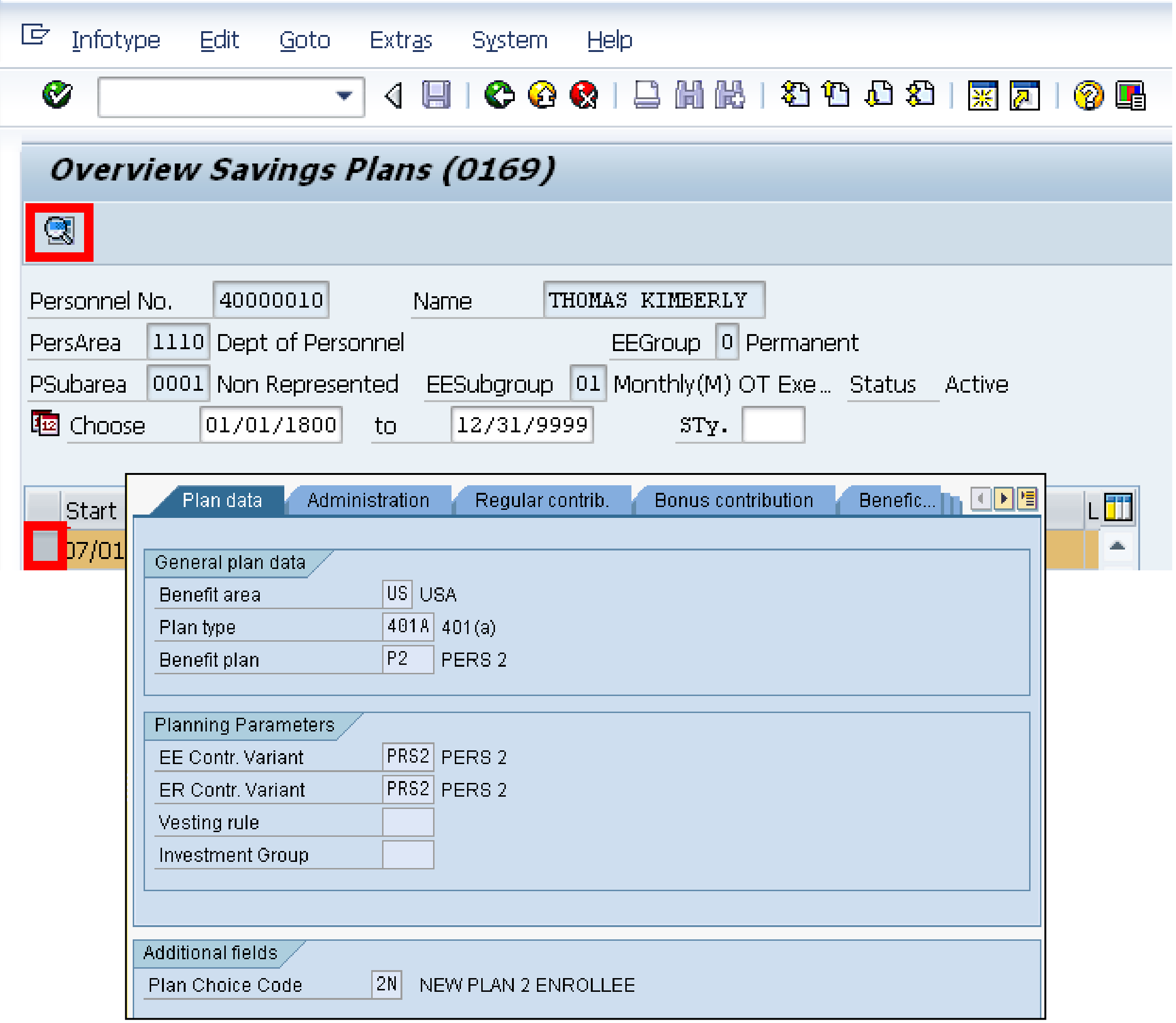
Direct selection

Infotype Savings Plans

STy

View *Savings Plan* (0169)

- Click the gray box next to the appropriate record
- Click **(Choose)** to view the selected record


Infotype
Edit
Goto
Extras
System
Help

Overview Savings Plans (0169)

Personnel No. 40000010 Name THOMAS KIMBERLY

PersArea 1110 Dept of Personnel EEGroup 0 Permanent

PSubarea 0001 Non Represented EESubgroup 01 Monthly(M) OT Exe... Status Active

Choose 01/01/1800 to 12/31/9999 STy.

Start
07/01

Plan data
Administration
Regular contrib.
Bonus contribution
Benefic...

General plan data

Benefit area US USA

Plan type 401A 401(a)

Benefit plan P2 PERS 2

Planning Parameters

EE Contr. Variant PRS2 PERS 2

ER Contr. Variant PRS2 PERS 2

Vesting rule

Investment Group

Additional fields

Plan Choice Code 2N NEW PLAN 2 ENROLLEE

Retirement Default Revision

- For an employee that defaulted to Plan 3 in error, and you need to reverse the selection.
  - Contact Department of Retirement Systems and they will move the employee back in the plan and inform the agency to enroll the employee in the right plan in HRMS.

See OLQR User Procedure, Retirement – Employee Enrolled into Incorrect Plan.

Retirement – Appointment Changes

- During the Appointment Change action **(PA40),** the employee will be re-enrolled into their plan.
  - Employees who are transferring to another agency will be given the option to choose a different Plan 3 rate and will have 90 days to do so.
- Similar to the New Hire or Rehire action **(PA40)** the enrollment process begins with the *General Benefits Information* (0171)

See OLQR User Procedure Appointment Change Action - Transfer

Retirement – Separation

- During the Separation action **(PA40)**, the agency will delimit all current *Savings Plan* (0169) records. The delimit date entered will be the 16th or the 1st of the month depending on the current pay period

  Note: Information should be entered before payroll has exited on DAY 3 of payroll. If this is not done prior, the agency will manually terminate through DRS via WBET.

See OLQR User Procedure, Separation Action

HRMS Activity

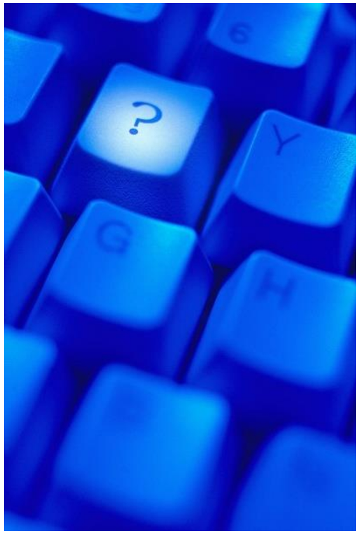
Complete Separation – Retirement

Exercise

Retirement – Mid-Period Transfer

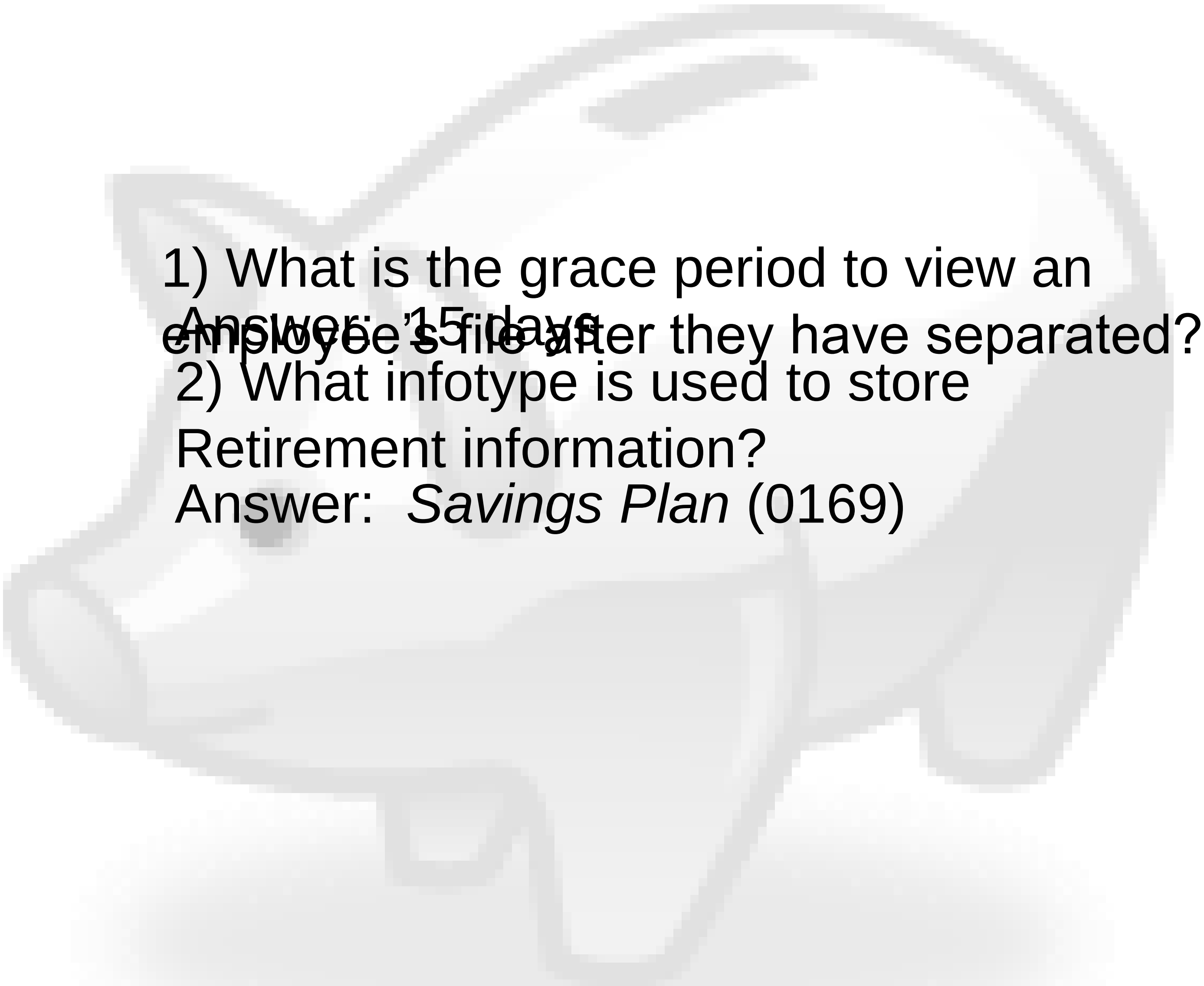
- Retirement is paid and reported by the gaining agency.
- WBET adjustments and coordination is required with DRS to report the retirement for the losing agency.

Retirement – OLQR Resources



- See Additional OLQR User Procedures:
  - ☐ Retirement Contribution Percentages
  - ☐ Retirement – Collecting Member Contributions in Arrears

Review Questions



1) What is the grace period to view an employee's file after they have separated?

Answer: 15 days

2) What infotype is used to store Retirement information?

Answer: *Savings Plan* (0169)

Deferred Compensation Program (DCP)

Deferred Compensation Program (DCP)

- The Department of Retirement Systems (DRS) administers the Deferred Compensation Program (DCP). DCP helps you save for retirement on a pre-tax basis. The funds that are contributed to DCP are deducted from your paycheck before taxes are taken out.
- State employees who are on full-time, part-time work schedule are eligible to participate.
  - Employees will enroll directly with DRS by completing the necessary forms. Once approved, the deductions will automatically be taken from the employee’s pay each pay period. (Within 30 days after approval)

Deferred Compensation Program (DCP)

- Employees will manage their own account via the DCP website or through the DCP Information Line.
  - Employees will decide the amount to be deducted and they will have the ability increase or decrease their deduction.
- The deduction information will be sent to Department of Enterprise Services via GAP 16 during Payroll DAYS 1, 2, 3 and 4.
  - Agencies should verify the deduction amount by running a Payroll Simulation.
- Funds are then transferred via Journal Voucher through interface GAP 21 to Department of Retirement Systems on Payroll DAY 4.

Deferred Compensation – Separation

- During the Separation action **(PA40)**, the agency will delimit *Savings Plans* (0169), which includes DCP with the end date of the last day of the pay period. (16th or the 1st).
  - Agencies have the ability to maintain the DCP record when necessary.

HRMS Reports

HRMS Reports

Upon completion of this section you will be able to:

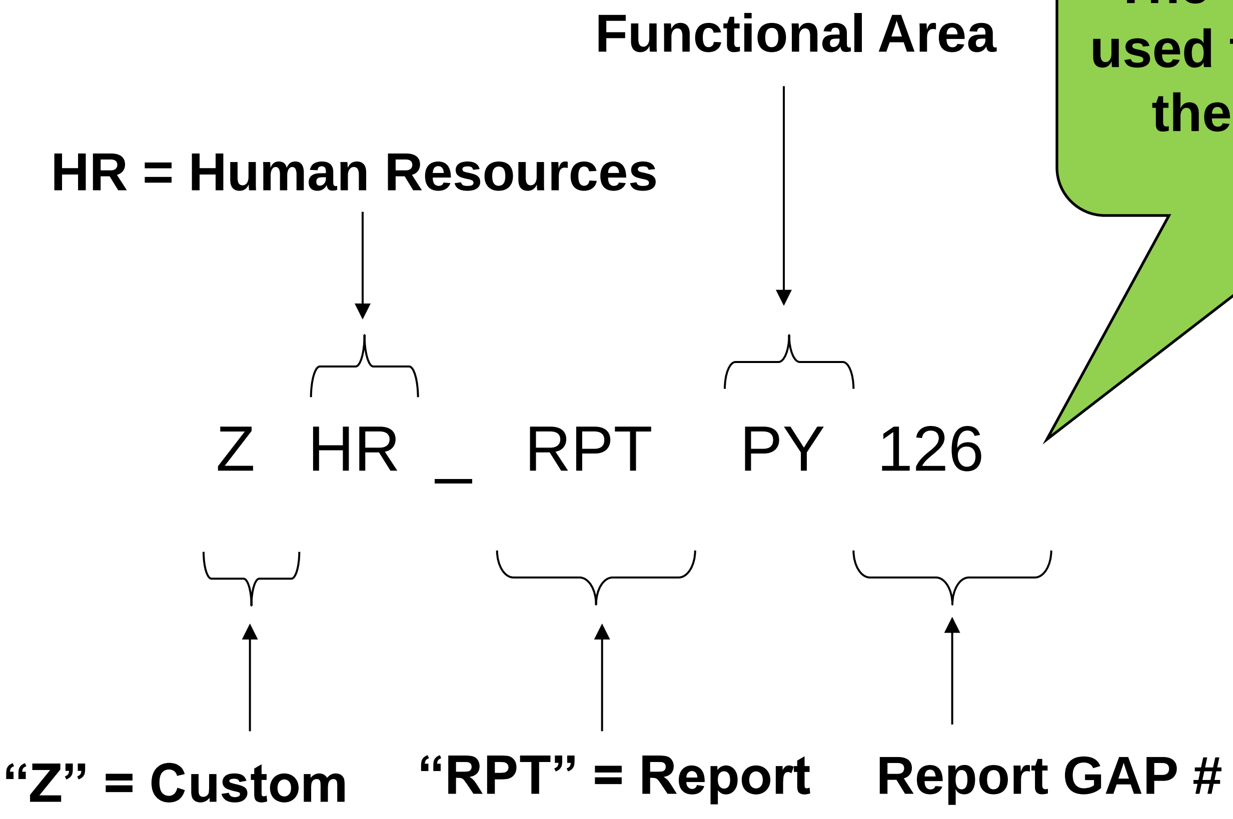
Apply the basic components of running reports needed to complete tasks

150
120
90
60
30
0
200
150
100
50
0

Reporting in HRMS

- HRMS integration provides the capability to run reports within Personnel Areas (agencies or sub-agencies)
- Generate reports to process information quickly to support decision making
- Export and manipulate “real-time” data

HRMS Customized Reporting - Transaction Code Map



Functional Area

HR = Human Resources

Z HR _ RPT PY 126

“Z” = Custom

“RPT” = Report

Report GAP #

The Transaction Code used for this example is the Payroll Posting Report.

Functional Areas:

PY – Payroll

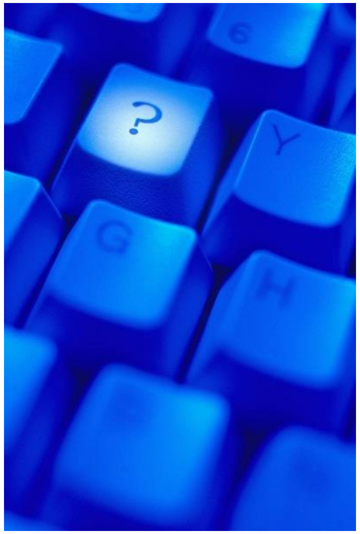
PA – Personnel Administration

OM – Organizational Management

TM – Time Management

BN - Benefits

HRMS Reporting – OLQR Resources



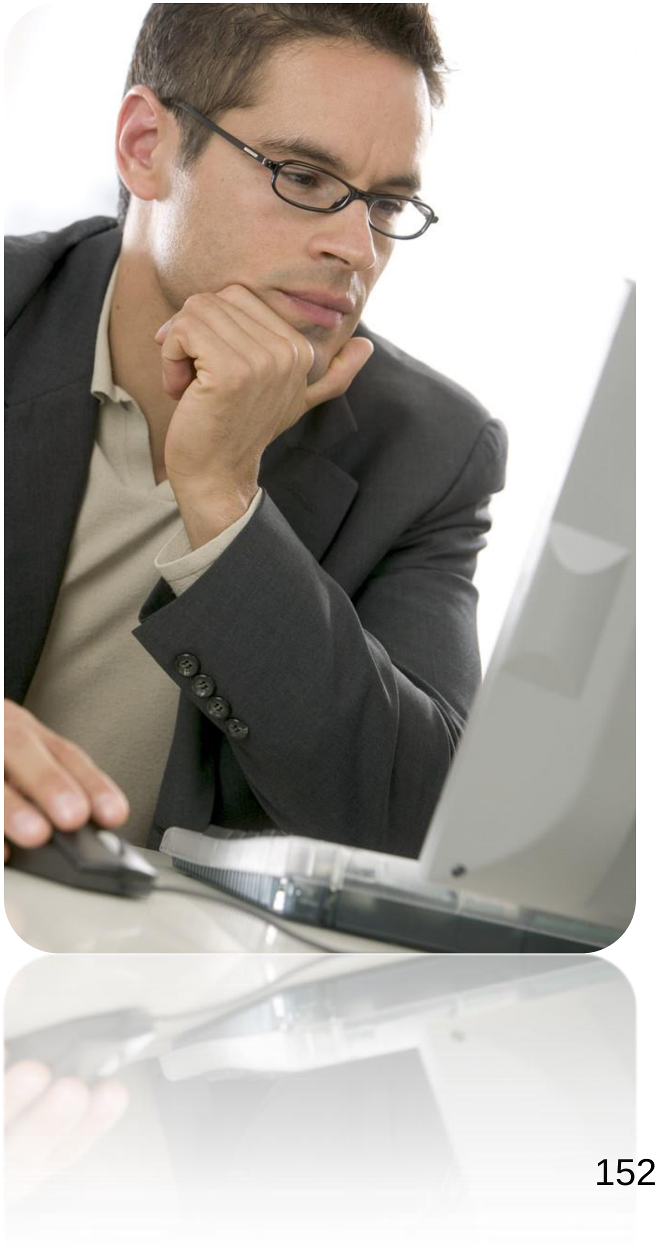
Visit the OLQR website (http://www.hr.wa.gov/payroll/HRMS/OnLineQuickReference) for the following:

- HRMS Reports
  - Variants_Create and Retrieve
- Job Aids A-Z

Visit the HRMS Support website (**http://www.hr.wa.gov/payroll/HRMS/HRMSSupport**) for a list of all Statewide variants.

Wage Type Reporter

- Use to identify transactions automatically recorded in the Agency State Payroll Revolving Account 035 – GL 5181, 5199
- Run the report when analysis on wage types used in the payroll process
- See OLQR User Procedure, **Wage Type Reporter**
- Access the report using transaction code **PC00_M99_CWTR**



HR
WSD **Personnel**

Wage Type Reporter – Statewide Variants

- The following Statewide Variants have been created for this report:

Variant Name	Description
SWV HI ERSHARE	Use to view Employer Health Insurance costs
SWV DEF COMP	Use to view Deferred Compensation deductions
SWV DEP CARE	Use to view Dependent Care deductions
SWV LIFE	Use to view employees with Life Insurance
SWV LTD	Use to view employees with LTD

Wage Type Reporter – Statewide Variants – cont'd

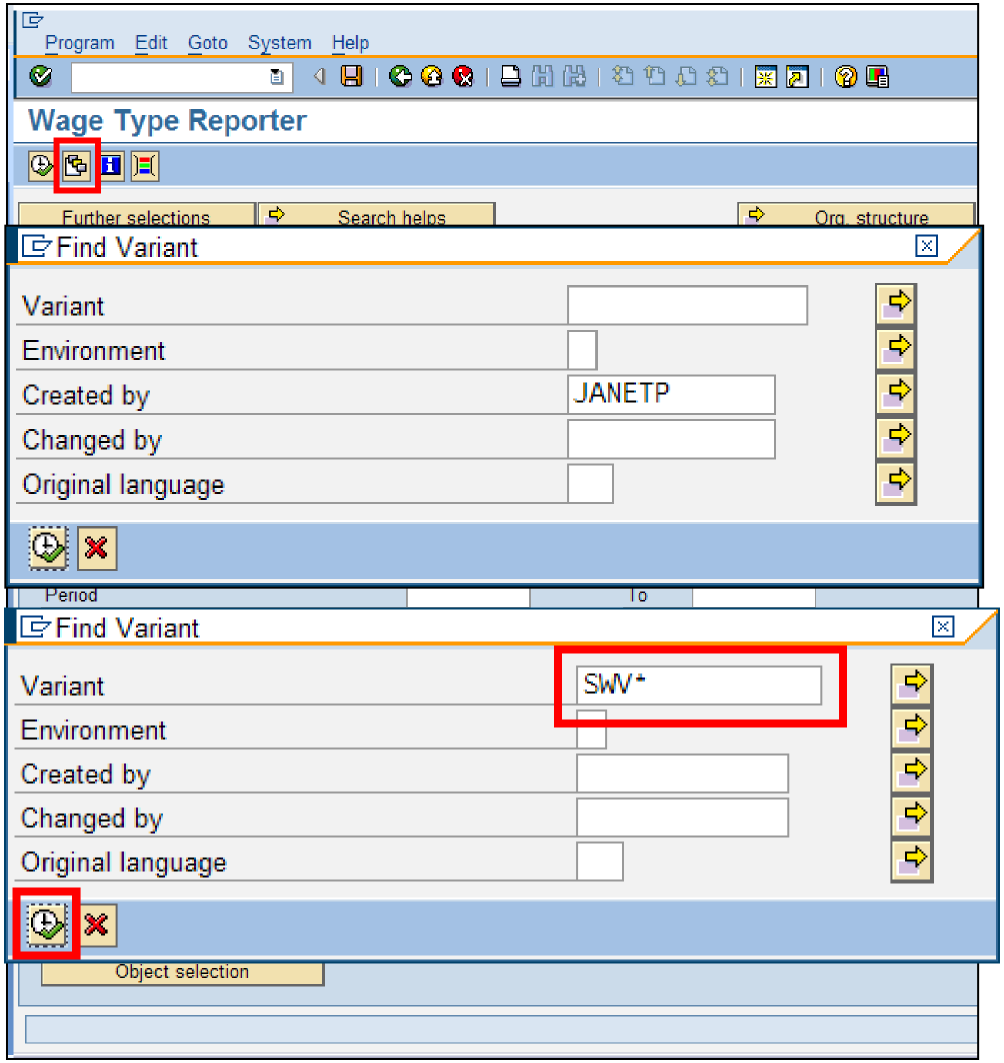
Variant Name	Description
SWV HI PRE TAX	The Health Insurance Pre and Post tax variants are used to assist agencies in their year-to-date reconciliation and is a replacement of the Health Insurance Miscellaneous Deduction Register (MDR)
SWV HI POST TAX	

See OLQR User Procedure, Variants_Create and Retrieve

WSD Personnel

Wage Type Reporter

- From the Application toolbar, click **(Get Variants…)**
- The Find Variant pop-up will appear. To view variants remove the name in the **Created by** field and enter SWV* in the Variant field, then click **(Execute)** to execute a process or action


Program
Edit
Goto
System
Help
Wage Type Reporter
Further selections
Search helps
Org. structure
Find Variant
Period
To
Find Variant
Object selection

Find Variant

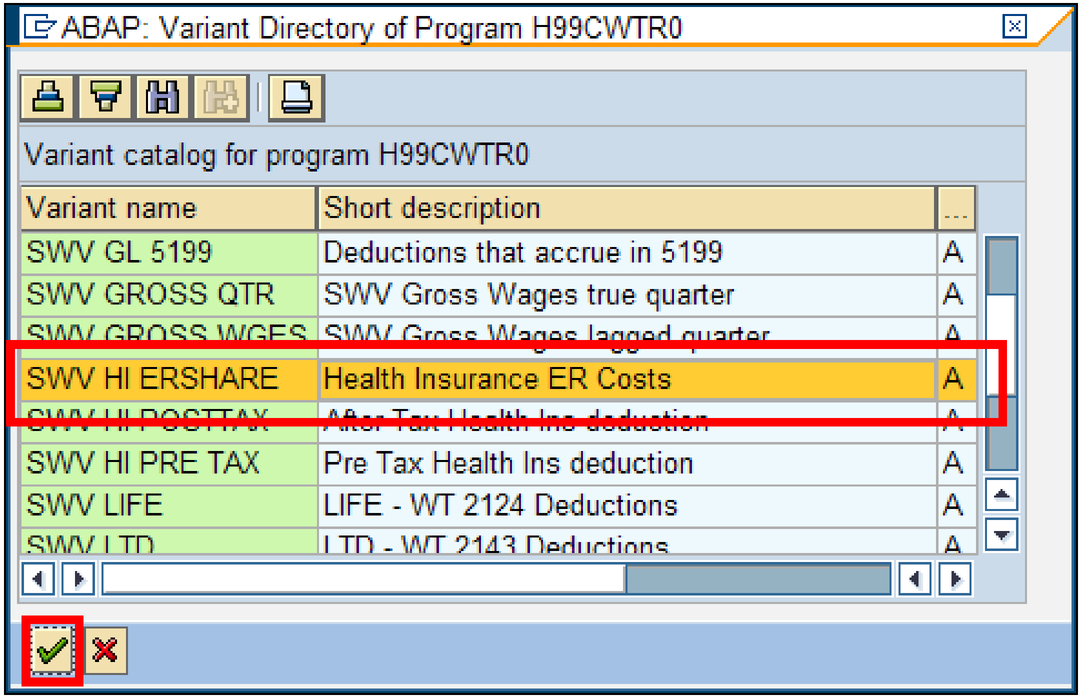
Variant
Environment
Created by: JANETP
Changed by
Original language

Find Variant

Variant: SWV*
Environment
Created by
Changed by
Original language

Wage Type Reporter

- Scroll down on the list to view and click on the appropriate variant
- Click ✓ **(Choose)** to proceed



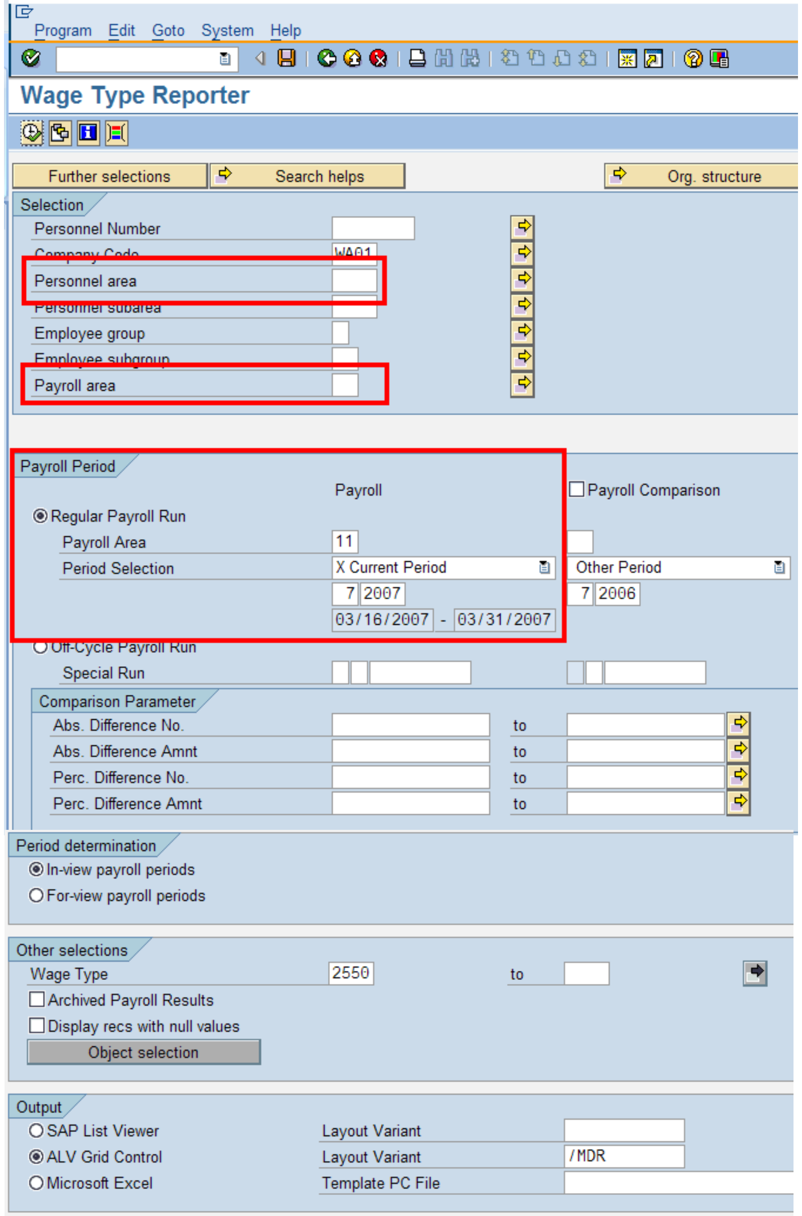
ABAP: Variant Directory of Program H99CWTR0

Variant catalog for program H99CWTR0

Variant name	Short description	...
SWV GL 5199	Deductions that accrue in 5199	A
SWV GROSS QTR	SWV Gross Wages true quarter	A
SWV GROSS WGES	SWV Gross Wages lagged quarter	A
SWV HI ERSHARE	Health Insurance ER Costs	A
SWV HI POSTTAX	After Tax Health Ins deduction	A
SWV HI PRE TAX	Pre Tax Health Ins deduction	A
SWV LIFE	LIFE - WT 2124 Deductions	A
SWV LTD	LTD - WT 2143 Deductions	A

Wage Type Reporter

- In the Selection screen, complete the following fields as required:
  - **Personnel Area**
    - *1110 (DOP)*
  - **Payroll area**
    - *11 (Semi-monthly)*
  - **Period Selection**
    - *Current (7/1 – 7/15)*
- Click **(Execute)** to execute a process or action



Wage Type Reporter

Selection

Personnel Number

Company Code WA01

Personnel area

Personnel subarea

Employee group

Employee subgroup

Payroll area

Payroll Period

Payroll | ☐ Payroll Comparison

● Regular Payroll Run

Payroll Area 11

Period Selection X Current Period | Other Period

7 2007 | 7 2006

03/16/2007 - 03/31/2007

○ Off-Cycle Payroll Run

Special Run

Comparison Parameter

Abs. Difference No. to

Abs. Difference Amnt to

Perc. Difference No. to

Perc. Difference Amnt to

Period determination

● In-view payroll periods

○ For-view payroll periods

Other selections

Wage Type 2550 to

☐ Archived Payroll Results

☐ Display recs with null values

Output

○ SAP List Viewer — Layout Variant

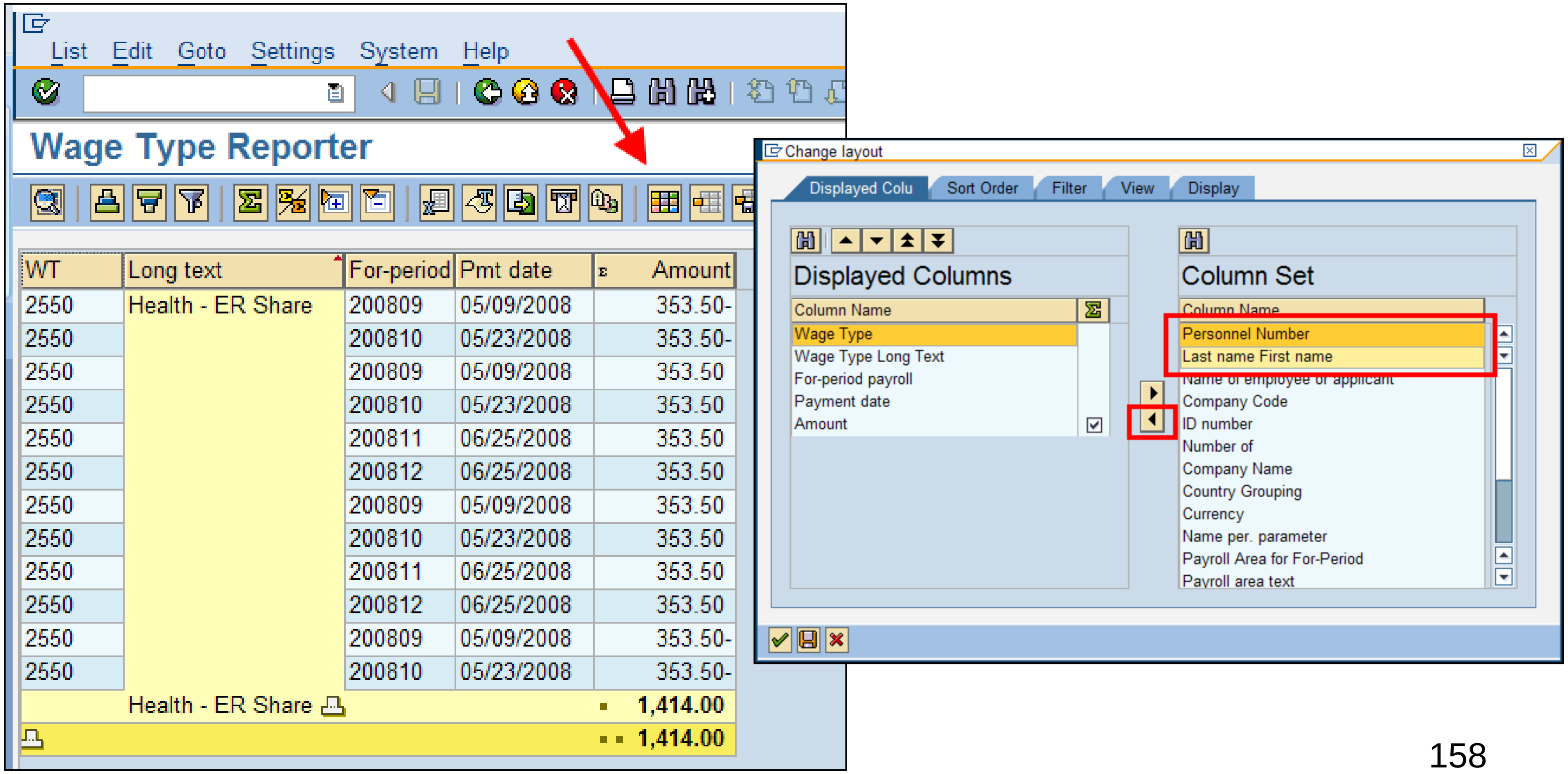
● ALV Grid Control — Layout Variant /MDR

○ Microsoft Excel — Template PC File

HR
WSD Personnel

Wage Type Reporter

- Once the results have been displayed, utilize ▦ **(Change Layout)** function which allows you to modify what information is displayed
  - In the example below, the columns Pers. No. and Last name First name have been added



Wage Type Reporter

WT	Long text	For-period	Pmt date	Amount
2550	Health - ER Share	200809	05/09/2008	353.50-
2550		200810	05/23/2008	353.50-
2550		200809	05/09/2008	353.50
2550		200810	05/23/2008	353.50
2550		200811	06/25/2008	353.50
2550		200812	06/25/2008	353.50
2550		200809	05/09/2008	353.50
2550		200810	05/23/2008	353.50
2550		200811	06/25/2008	353.50
2550		200812	06/25/2008	353.50
2550		200809	05/09/2008	353.50-
2550		200810	05/23/2008	353.50-
	Health - ER Share			1,414.00
				1,414.00

Change layout

Displayed Columns

Column Name
Wage Type
Wage Type Long Text
For-period payroll
Payment date
Amount ☑

Column Set

Column Name
Personnel Number
Last name First name
Name of employee or applicant
Company Code
ID number
Number of
Company Name
Country Grouping
Currency
Name per. parameter
Payroll Area for For-Period
Payroll area text

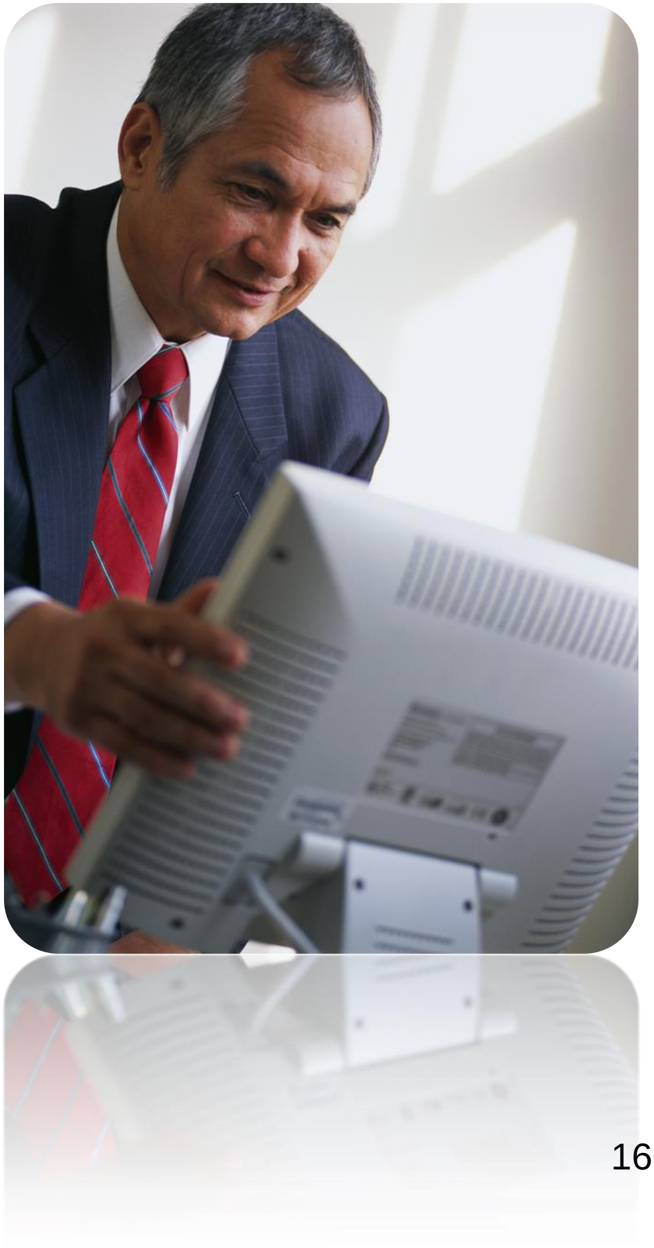
HRMS Activity

Wage Type Reporter – PC00_M99_CWTR

Walk-through

Payroll Posting Report

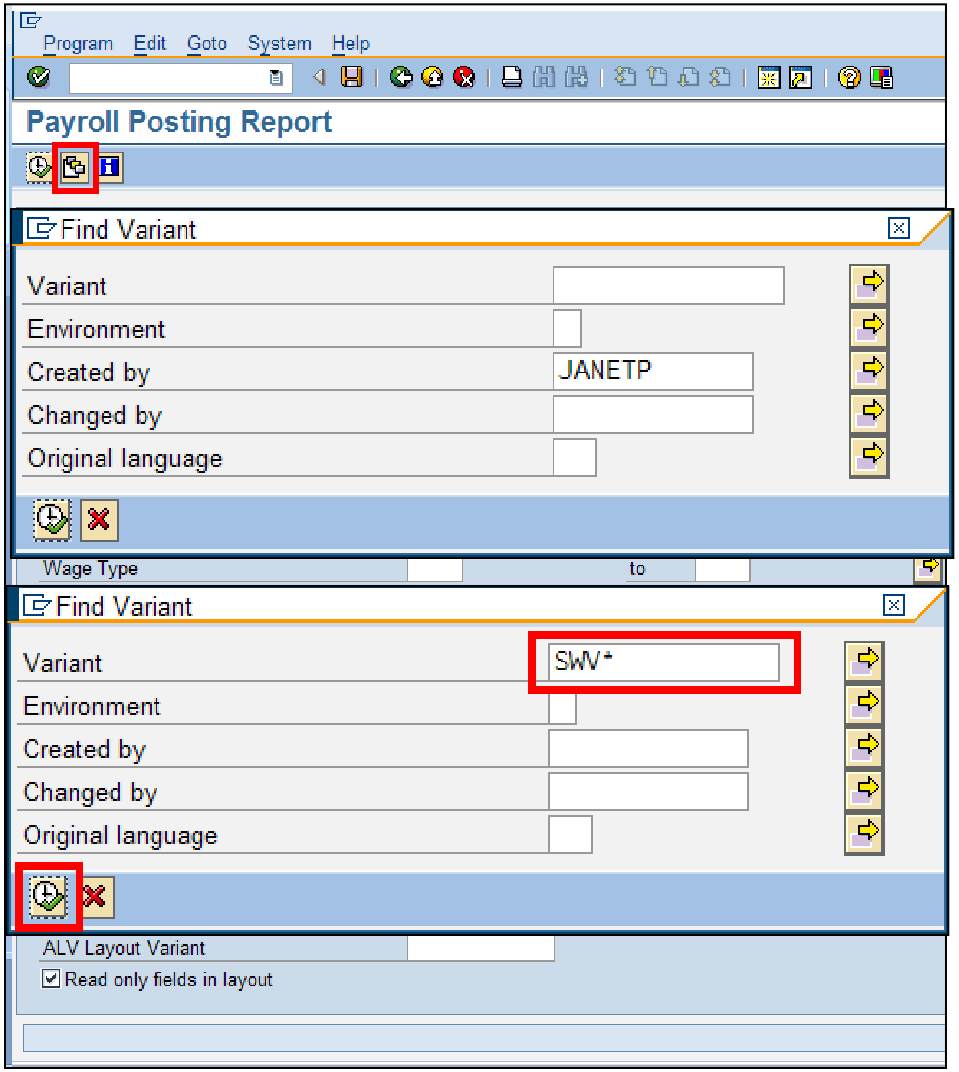
- Use to read the payroll posting data after it has been processed by the Automated Liability Apportionment Solution (ALAS) program
- See OLQR User Procedure, **Payroll Posting Report**
- Access the report using the transaction code **ZHR_RPTPY126**



HR
WSD Personnel

Payroll Posting Report

- From the Application toolbar, click **(Get Variants…)**
- The Find Variant pop-up will appear. Remove the name in the *Created by* field and type **SWV*** in the *Variant field* then click **(Execute)** to execute a process or action



Payroll Posting Report

Find Variant

Variant

Environment

Created by: JANETP

Changed by

Original language

Wage Type to

Find Variant

Variant: SWV*

Environment

Created by

Changed by

Original language

ALV Layout Variant

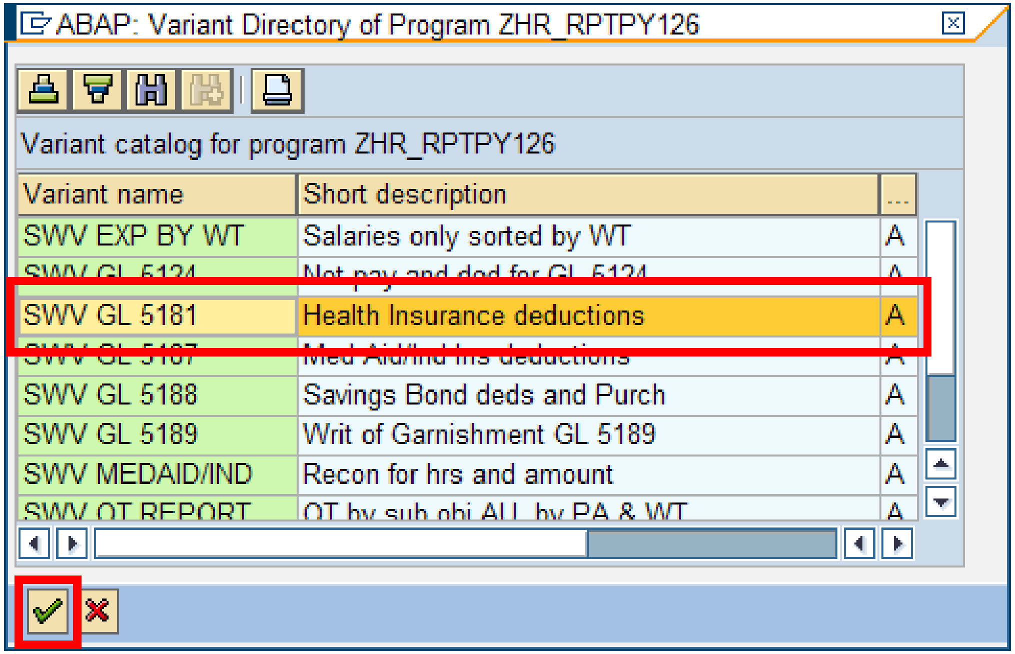
☑ Read only fields in layout

Payroll Posting Report

- Scroll down on the list to view and click on the appropriate variant
  - The following variant has been created:

    SWV GL 5181

- Click ✓ **(Choose)** to proceed



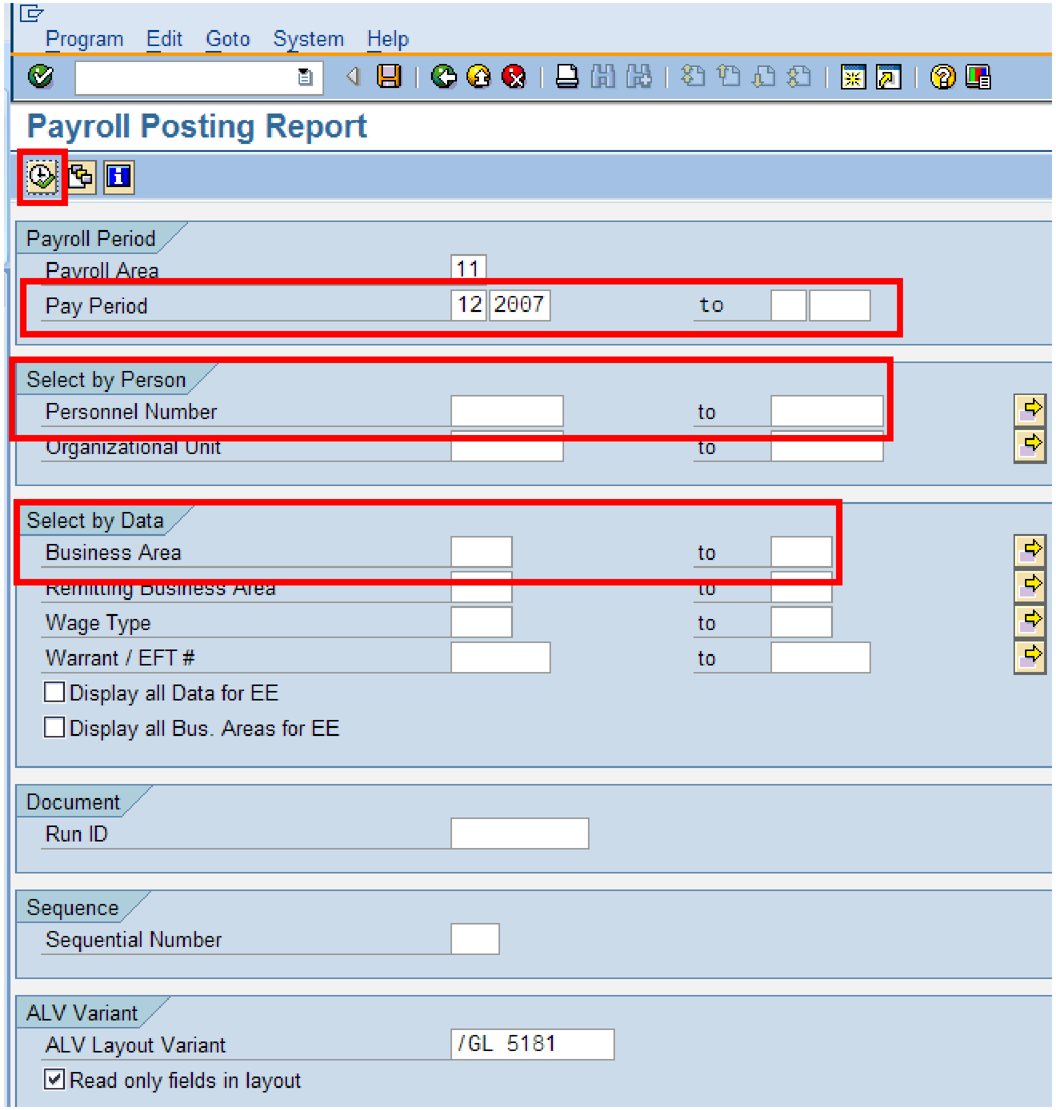
ABAP: Variant Directory of Program ZHR_RPTPY126

Variant catalog for program ZHR_RPTPY126

Variant name	Short description	...
SWV EXP BY WT	Salaries only sorted by WT	A
SWV GL 6124	Net pay and ded for GL 6124	A
SWV GL 5181	Health Insurance deductions	A
SWV GL 5187	Med Aid/Ind Ins deductions	A
SWV GL 5188	Savings Bond deds and Purch	A
SWV GL 5189	Writ of Garnishment GL 5189	A
SWV MEDAID/IND	Recon for hrs and amount	A
SWV OT REPORT	OT by sub obj ALL by PA & WT	A

Payroll Posting Report

- In the selection screen, complete the required and conditional fields:
  - **Pay Period**
  - **Personnel Number** OR
  - **Personnel Area** OR
  - **Business Area**
- Click **(Execute)**



Payroll Posting Report

Payroll Period

Payroll Area 11

Pay Period 12 2007 to

Select by Person

Personnel Number to

Organizational Unit to

Select by Data

Business Area to

Remitting Business Area to

Wage Type to

Warrant / EFT # to

☐ Display all Data for EE

☐ Display all Bus. Areas for EE

Document

Run ID

Sequence

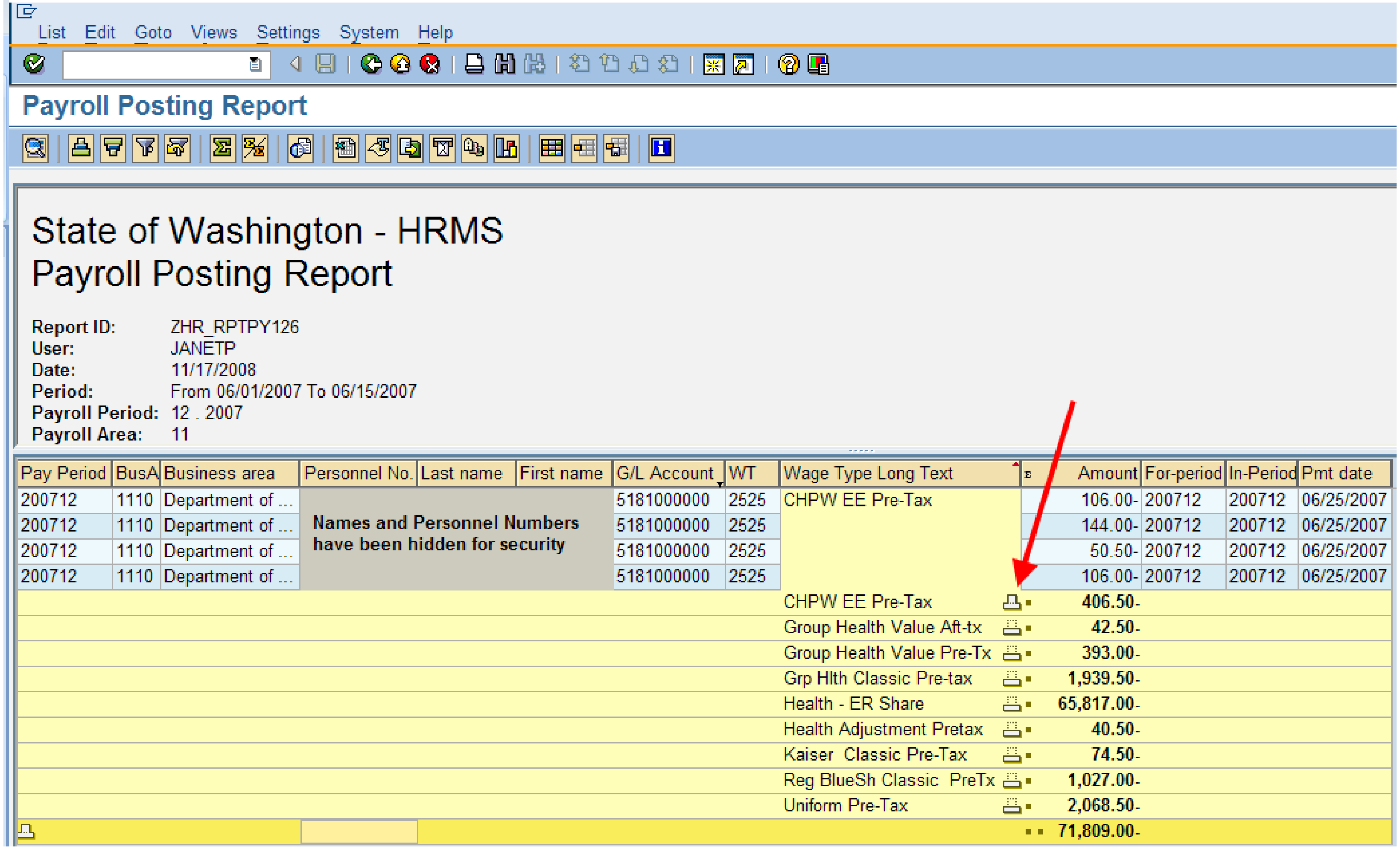
Sequential Number

ALV Variant

ALV Layout Variant /GL 5181

☑ Read only fields in layout

Payroll Posting Report



State of Washington - HRMS
Payroll Posting Report

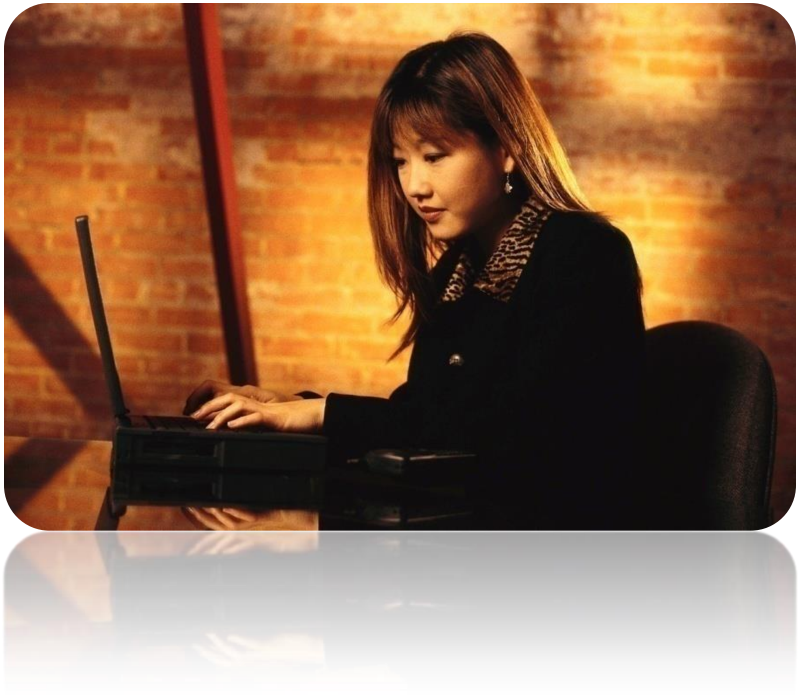
Report ID: ZHR_RPTPY126
User: JANETP
Date: 11/17/2008
Period: From 06/01/2007 To 06/15/2007
Payroll Period: 12 . 2007
Payroll Area: 11

Pay Period	BusA	Business area	Personnel No.	Last name	First name	G/L Account	WT	Wage Type Long Text	Σ	Amount	For-period	In-Period	Pmt date
200712	1110	Department of ...	**Names and Personnel Numbers have been hidden for security**			5181000000	2525	CHPW EE Pre-Tax		106.00-	200712	200712	06/25/2007
200712	1110	Department of ...				5181000000	2525			144.00-	200712	200712	06/25/2007
200712	1110	Department of ...				5181000000	2525			50.50-	200712	200712	06/25/2007
200712	1110	Department of ...				5181000000	2525			106.00-	200712	200712	06/25/2007
								CHPW EE Pre-Tax	▪	**406.50-**			
								Group Health Value Aft-tx	▪	**42.50-**			
								Group Health Value Pre-Tx	▪	**393.00-**			
								Grp Hlth Classic Pre-tax	▪	**1,939.50-**			
								Health - ER Share	▪	**65,817.00-**			
								Health Adjustment Pretax	▪	**40.50-**			
								Kaiser Classic Pre-Tax	▪	**74.50-**			
								Reg BlueSh Classic PreTx	▪	**1,027.00-**			
								Uniform Pre-Tax	▪	**2,068.50-**			
									▪▪	**71,809.00-**			

Note: To see the details of each type of insurance, click (Sub-totals).

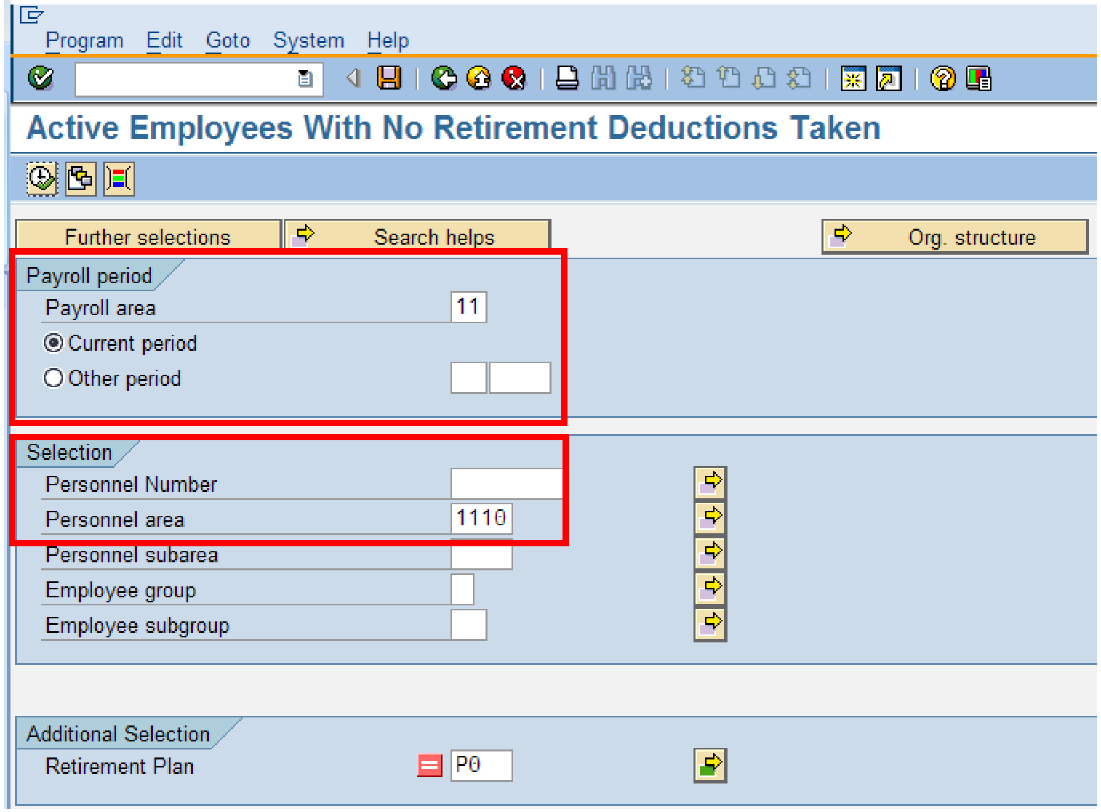
Active Employees With No Retirement Deductions Taken Report

- Use to identify employee who did not have retirement deducted from their pay during a specific payroll period
- See OLQR User Procedure, **Active Employees With No Retirement Deductions Taken**
- Access the report using the transaction code **ZHR_RPTPY024**



Active Employees With No Retirement Deductions Taken Report

- In the selection screen, complete the required and conditional fields:
  - **Pay Area**
  - **Current Period or Other Period**
  - **Personnel Number** OR
  - **Personnel Area**
  - **Employee Group or subgroup**
- Click **(Execute)** to execute a process or action.


Program
Edit
Goto
System
Help
Further selections
Search helps
Org. structure

Active Employees With No Retirement Deductions Taken

Payroll period

Payroll area: 11

● Current period

○ Other period

Selection

Personnel Number:

Personnel area: 1110

Personnel subarea:

Employee group:

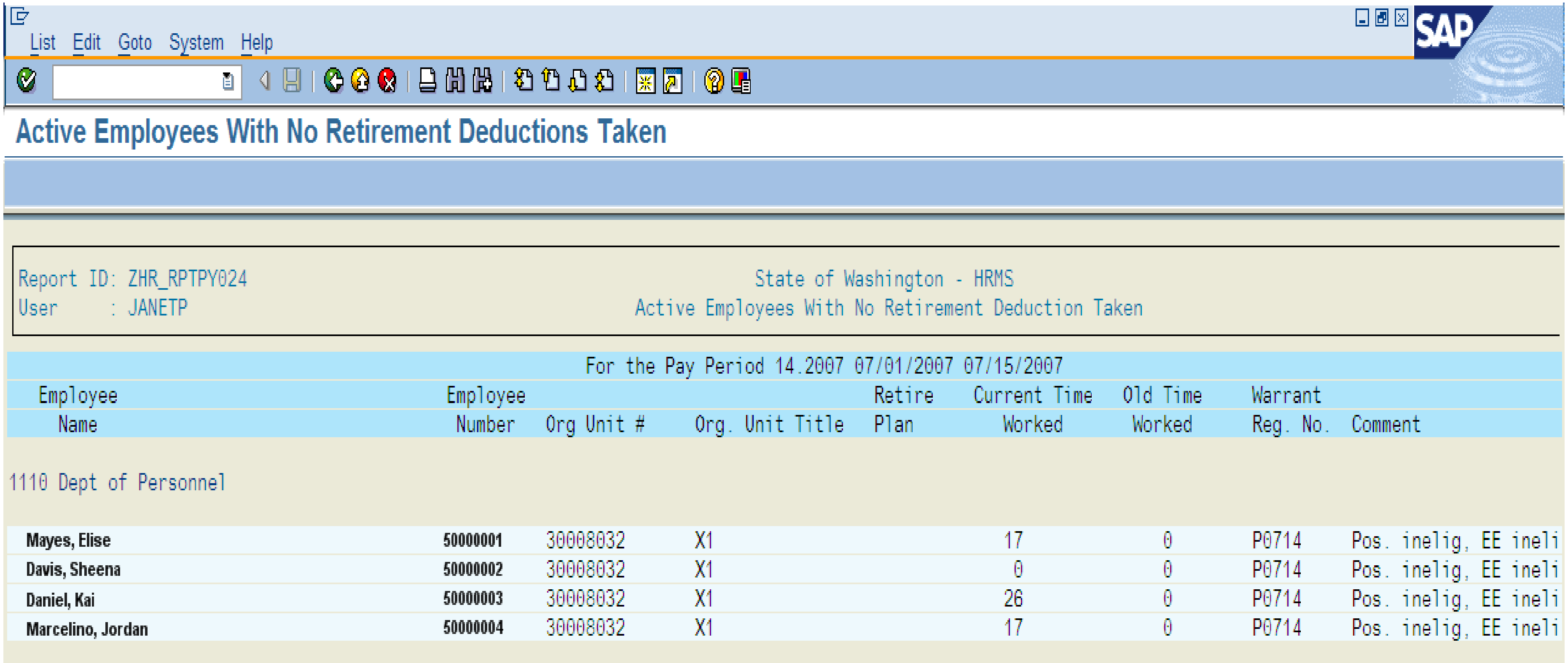
Employee subgroup:

Additional Selection

Retirement Plan: P0

Note: To add additional selection fields, click on Further Selections.

Active Employees With No Retirement Deductions Taken Report



Active Employees With No Retirement Deductions Taken

Report ID: ZHR_RPTPY024
User : JANETP

State of Washington - HRMS
Active Employees With No Retirement Deduction Taken

For the Pay Period 14.2007 07/01/2007 07/15/2007

Employee Name	Employee Number	Org Unit #	Org. Unit Title	Retire Plan	Current Time Worked	Old Time Worked	Warrant Reg. No.	Comment
1110 Dept of Personnel								
Mayes, Elise	**50000001**	30008032	X1		17	0	P0714	Pos. inelig, EE ineli
Davis, Sheena	**50000002**	30008032	X1		0	0	P0714	Pos. inelig, EE ineli
Daniel, Kai	**50000003**	30008032	X1		26	0	P0714	Pos. inelig, EE ineli
Marcelino, Jordan	**50000004**	30008032	X1		17	0	P0714	Pos. inelig, EE ineli

Understanding Results: Active Employee with No Retirement Deductions Taken

Position	Employee	Enrolled	Deduction Taken	Comment on Report
Eligible	Eligible	Yes	Yes	Bypass employee
Eligible	Eligible	Yes	No	Pos. eligible, EE eligible, enrolled
Eligible	Eligible	No	Yes	Not possible; inconsistent
Eligible	Eligible	No	No	Pos. eligible, EE eligible, not enrolled
Eligible	Ineligible	Yes	Yes	Not possible, inconsistent
Eligible	Ineligible	Yes	No	Not possible; inconsistent
Eligible	Ineligible	No	Yes	Not possible, inconsistent
Eligible	Ineligible	No	No	OK but inconsistent
Ineligible	Eligible	Yes	Yes	OK but inconsistent
Ineligible	Eligible	Yes	No	Pos. ineligible, EE eligible, enrolled ; inconsistent

HRMS Activity

Active Employees With No Retirement

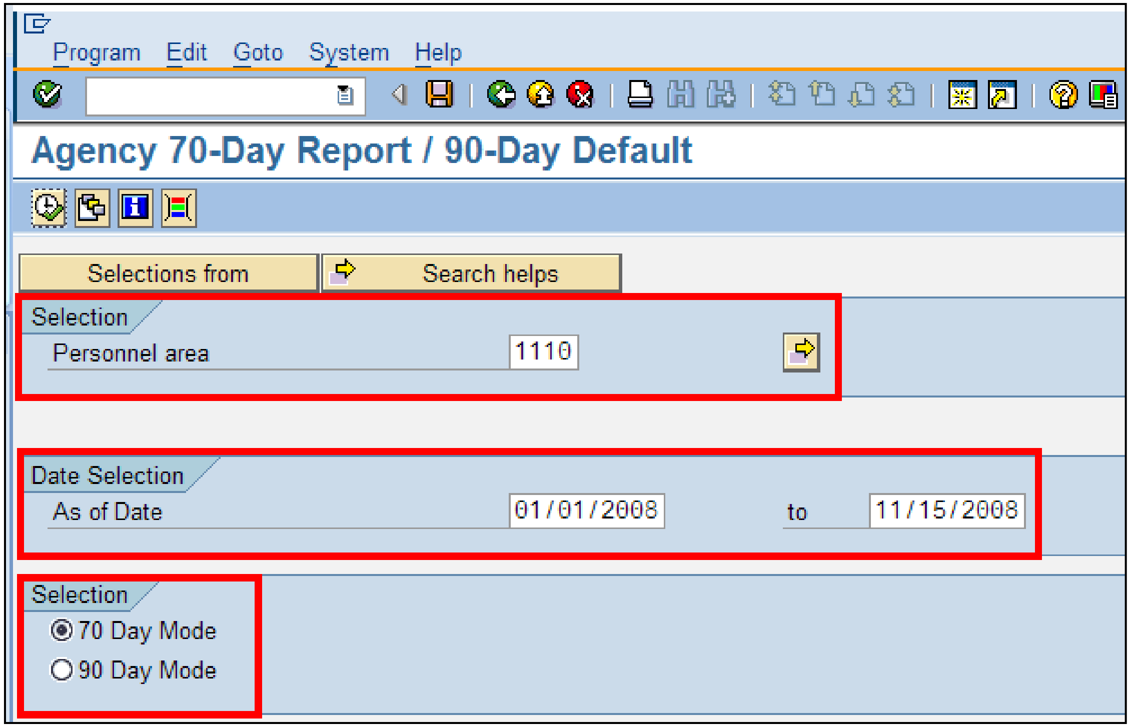
Walk-through and Exercise

Agency 70-Day Report / 90-Day Default

- Use to identify employees who are in their 90-day “choice” period
- Access the report using the transaction code **ZHR_RPTBNN28A**

Agency 70-Day Report / 90-Day Default

- From the Selection screen, complete the required fields:
  - **Personnel area**
    - *1110 (DOP)*
  - **As of Date**
    - *8/1/07 to 8/31/07*
- Choose the radio button for 70-Day or 90-Day Mode
- Click **(Execute)** to execute a process or action


Program
Edit
Goto
System
Help
Selections from
Search helps

Agency 70-Day Report / 90-Day Default

Selection

Personnel area 1110

Date Selection

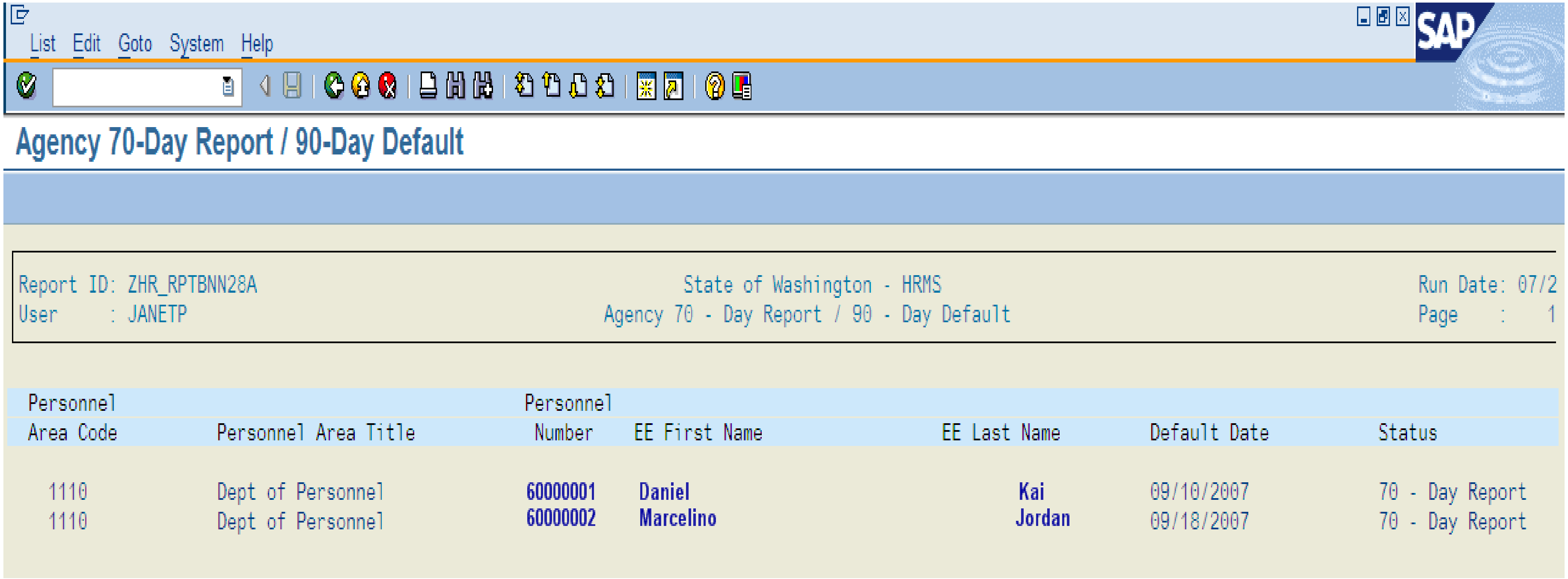
As of Date 01/01/2008 to 11/15/2008

Selection

● 70 Day Mode

○ 90 Day Mode

Agency 70-Day Report / 90-Day Default



Agency 70-Day Report / 90-Day Default

```
Report ID: ZHR_RPTBNN28A                          State of Washington - HRMS                         Run Date: 07/2
User     : JANETP                           Agency 70 - Day Report / 90 - Day Default                Page    :    1

Personnel                                   Personnel
Area Code      Personnel Area Title          Number    EE First Name           EE Last Name    Default Date     Status

  1110         Dept of Personnel            60000001   Daniel                       Kai        09/10/2007       70 - Day Report
  1110         Dept of Personnel            60000002   Marcelino                    Jordan     09/18/2007       70 - Day Report
```

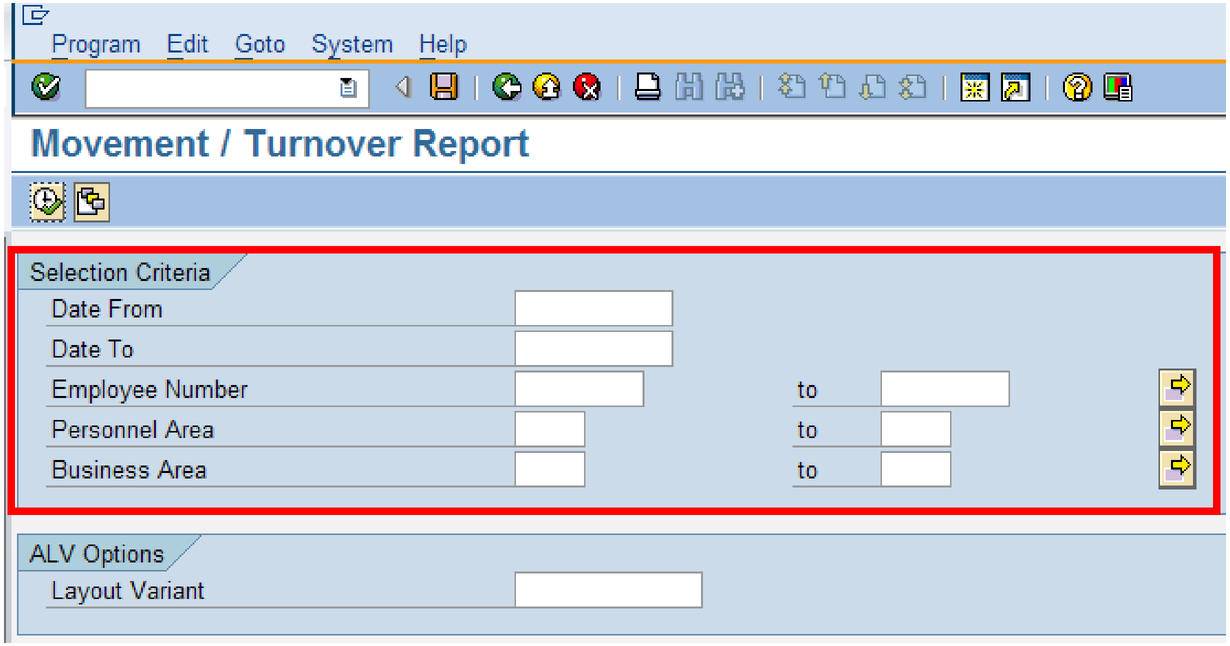
Movement – Turnover Report

- Used to identify employees who have left an agency or sub-agency (Business / Personnel Area); have been hired into the agency or sub-agency (Business / Personnel Area); or who have moved into another sub-agency (Personnel Area) within the agency (Business Area)
- Run the report when analysis on new hires is needed.
- Access the report using the transaction code **ZHR_RPTPYU26**.

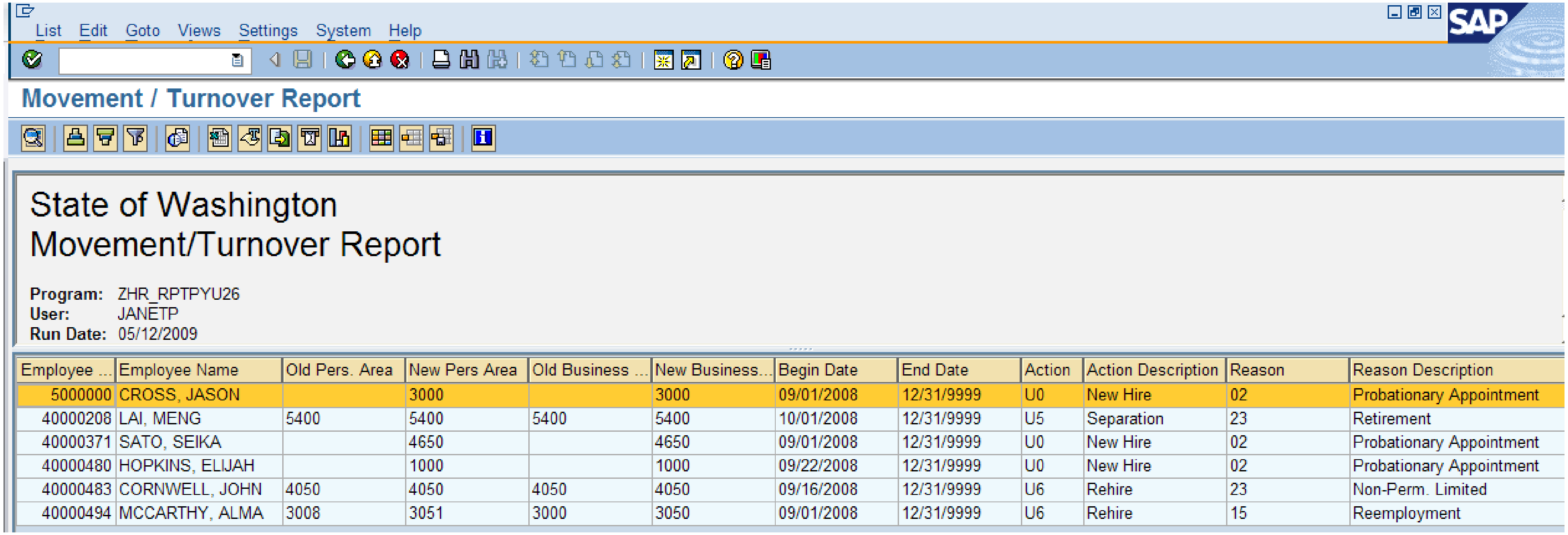
Aug
Sep
Oct
Nov
Dec
10
0

Movement – Turnover Report

- Conditional selection criteria include:
  - **Date From**
  - **Date To**
  - **Personnel Area** OR
  - **Business Area**
- Click **(Execute)** to execute the report.


Program
Edit
Goto
System
Help
Movement / Turnover Report
Selection Criteria
Date From
Date To
Employee Number
to
Personnel Area
to
Business Area
to
ALV Options
Layout Variant

Viewing Results: Movement – Turnover Report



Movement / Turnover Report

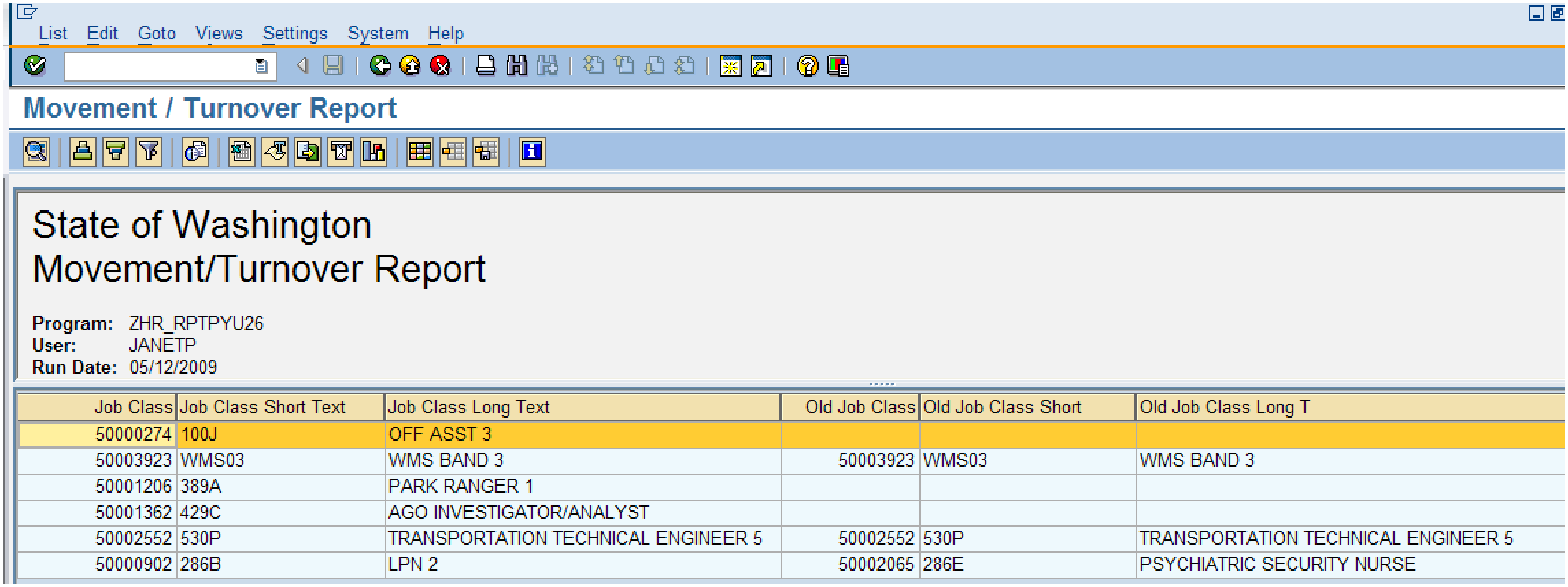
State of Washington
Movement/Turnover Report

Program: ZHR_RPTPYU26
User: JANETP
Run Date: 05/12/2009

Employee ...	Employee Name	Old Pers. Area	New Pers Area	Old Business ...	New Business...	Begin Date	End Date	Action	Action Description	Reason	Reason Description
5000000	CROSS, JASON		3000		3000	09/01/2008	12/31/9999	U0	New Hire	02	Probationary Appointment
40000208	LAI, MENG	5400	5400	5400	5400	10/01/2008	12/31/9999	U5	Separation	23	Retirement
40000371	SATO, SEIKA		4650		4650	09/01/2008	12/31/9999	U0	New Hire	02	Probationary Appointment
40000480	HOPKINS, ELIJAH		1000		1000	09/22/2008	12/31/9999	U0	New Hire	02	Probationary Appointment
40000483	CORNWELL, JOHN	4050	4050	4050	4050	09/16/2008	12/31/9999	U6	Rehire	23	Non-Perm. Limited
40000494	MCCARTHY, ALMA	3008	3051	3000	3050	09/01/2008	12/31/9999	U6	Rehire	15	Reemployment

Note: The report allows you to go directly into the employee's HR Master Data by double-clicking on the employee's record in the report results.

Viewing Results: Movement – Turnover Report



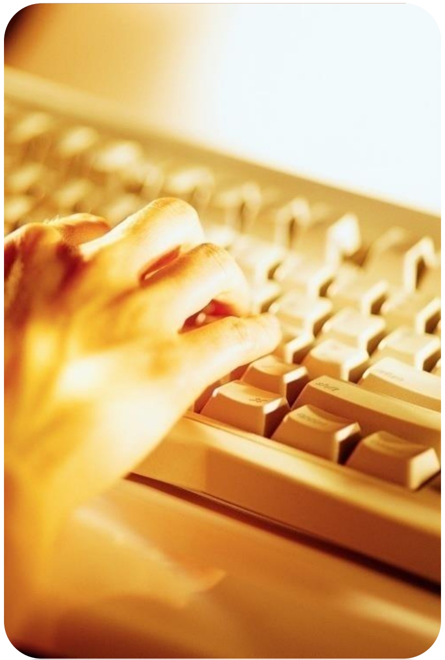
Movement / Turnover Report

State of Washington
Movement/Turnover Report

Program: ZHR_RPTPYU26
User: JANETP
Run Date: 05/12/2009

Job Class	Job Class Short Text	Job Class Long Text	Old Job Class	Old Job Class Short	Old Job Class Long T
50000274	100J	OFF ASST 3			
50003923	WMS03	WMS BAND 3	50003923	WMS03	WMS BAND 3
50001206	389A	PARK RANGER 1			
50001362	429C	AGO INVESTIGATOR/ANALYST			
50002552	530P	TRANSPORTATION TECHNICAL ENGINEER 5	50002552	530P	TRANSPORTATION TECHNICAL ENGINEER 5
50000902	286B	LPN 2	50002065	286E	PSYCHIATRIC SECURITY NURSE

HRMS Activity



Movement – Turnover

Walk-through and Exercise

Other Reports

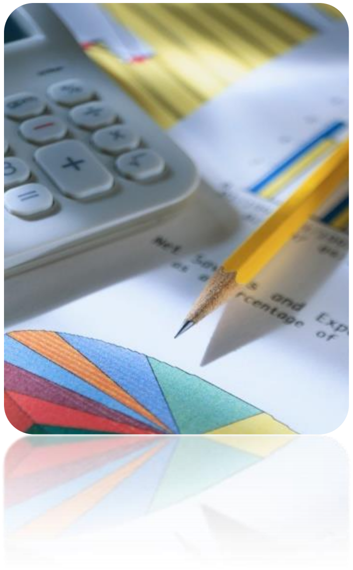
- **Payroll Journal Voucher Report (ZHR_RPTPY376)**
  - Use to display a record of money to transfer between agencies and funds via a Journal Voucher (JV)
  - Run anytime preferably after payroll runs
- **Preemptive Payroll Threshold Check (ZHR_RPTPYN08)**
  - Use to identify any deductions in arrears
  - Run prior to payroll being released and prior to payroll exiting
- **Plan 3 Age Banded Rate Changes (ZHR_RPTBNN30A)**
  - Use to identify employees in the PERS 3 (Option B and C) who will have a rate increase
  - Run anytime before DAY 1

Other Reports – cont'd

- **Preemptive Basic Data Check (ZHR_RPTPYN06)**
  - By including Savings Plan (0169) it will provide a list of employee's who do not have retirement set-up
  - This can be run daily or anytime
- **EEs with No Retirement Contribution (ZHR_RPTBNN29)**
  - Use to identify employees that are set-up with a retirement plan, but no percentage has been entered
  - Run anytime, but especially important to run it on DAY 2 and 3
- **Identify Type Code / Retirement System Mismatches (ZHR_RPTBNN03)**
  - Identifies any retirement system mismatches
  - Run anytime, but especially important to run it on DAY 2 and 3

Other Reports – cont’d

- **Payroll Simulation (PC00_M10_CALC_SIMU)**
  - Use to simulate results for a payroll run
    - Ensures the correct deductions are being made for the employee
  - Run prior to payroll being released and prior to payroll exiting



Health Care Authority Report

PAY1/HRMS Agency Mismatch Report

- This report is provided directly from Health Care Authority (HCA)
- HCA has developed a process to identify employees whose agency/sub-agency does not match between HRMS and PAY1
- HCA will provide this report to agencies on a monthly basis

Summary

- **Throughout the course, you have been explained how to:**
  - Complete Health Care and Retirement Benefit enrollment and maintenance
  - Create Qualified Domestic Partner Benefit Status and Post-Tax Medical Deductions
  - View and maintain Optional Plans
  - Use HRMS Reports

HRMS Resources

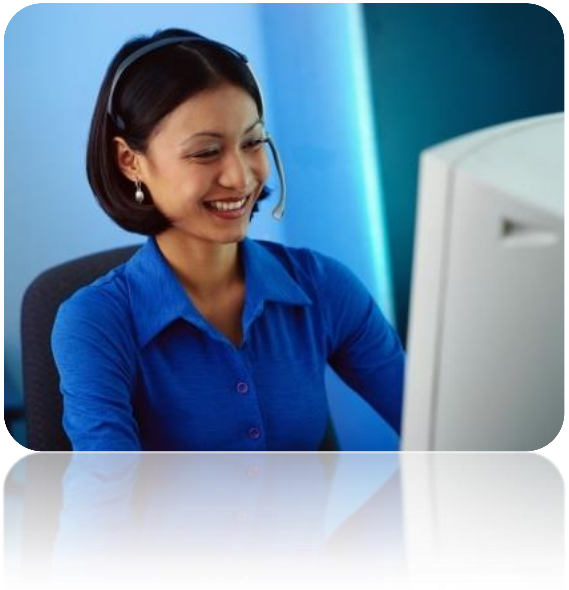
The following resources are available for your use:

- DES Solutions Center– (360) 407.9100
  - SolutionsCenter@DES.WA.GOV
- The On-Line Quick Reference
  - http://www.hr.wa.gov/payroll/HRMS/OnLineQuickReference/
- HRMS Support Website
  - http://www.hr.wa.gov/payroll/HRMS/HRMSSupport/Pages/default.aspx
- HRMS Data Definitions
  - http://www.hr.wa.gov/payroll/HRMS/OnLineQuickReference/Pages/HRMSDataDefinitions.aspx

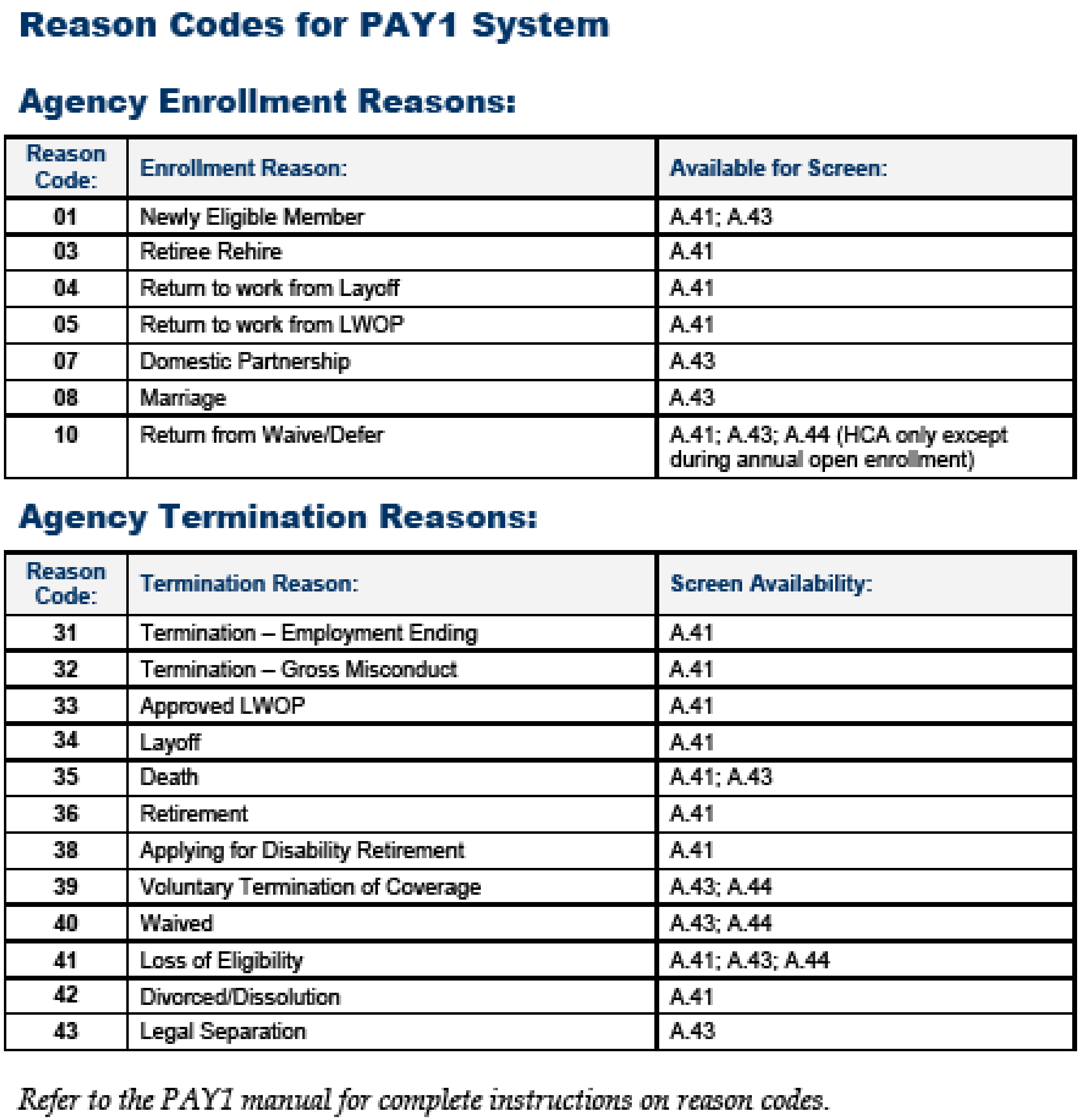
HRMS Resources – cont'd

The following resources are available for your use:

- Health Care Authority
  - www.pebb.hca.wa.gov
  - FUZE – http://www.fuzeqna.com/perspay/consumer/search.asp
- Flex Plan
  - (800)669-3539



HRMS Resources – cont'd



Reason Codes for PAY1 System

Agency Enrollment Reasons:

Reason Code:	Enrollment Reason:	Available for Screen:
01	Newly Eligible Member	A.41; A.43
03	Retiree Rehire	A.41
04	Return to work from Layoff	A.41
05	Return to work from LWOP	A.41
07	Domestic Partnership	A.43
08	Marriage	A.43
10	Return from Waive/Defer	A.41; A.43; A.44 (HCA only except during annual open enrollment)

Agency Termination Reasons:

Reason Code:	Termination Reason:	Screen Availability:
31	Termination – Employment Ending	A.41
32	Termination – Gross Misconduct	A.41
33	Approved LWOP	A.41
34	Layoff	A.41
35	Death	A.41; A.43
36	Retirement	A.41
38	Applying for Disability Retirement	A.41
39	Voluntary Termination of Coverage	A.43; A.44
40	Waived	A.43; A.44
41	Loss of Eligibility	A.41; A.43; A.44
42	Divorced/Dissolution	A.41
43	Legal Separation	A.43

Refer to the PAY1 manual for complete instructions on reason codes.

Questions...

Training Evaluation

- Please take a few minutes to complete the course evaluation and participant assessment prior to leaving.

Thank you for your participation